Data Transport

User Manual

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Office of Public Instruction
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Table of Contents

Table of Figures

Table of Instructions Tables

Table of Screens

Revision History

Version Number	Date	Summary of Changes	Section(s)
1.0	03/12/15	Initially published draft	N/A
1.0	09/28/15	Updated based to reflect system enhancements	

1.   Data Transport System Overview

The Office of Public Instruction (OPI) is facilitating the collection and exchange of transcript information by creating an electronic student transcript repository for K12 education (called the Data Transport System). This will allow the State of Montana to better align skills and outcomes of traditional students and adult learners with workforce skills to help drive economic development and job creation in the State of Montana.

1.1   Purpose

The Data Transport System (DTS) is the implementation of a comprehensive Operational Data Store (ODS) and underlying computing technology to collect, store, and report on student transcript data. The system addresses data collection and reporting capabilities by including:

- The ability to regularly submit and update student transcript data, using a workflow to facilitate data interchanges between school districts and the Data Transport System

- The ability to validate data and certify data

- The ability for districts to generate a number of reports. Districts will be able to apply standard filters as well as to extract and download their data from the system to conduct their own analyses using their local analysis tools.

Districts and schools may submit transcript data for any student in the current school year or any of the three previous school years. Students may request free, certified electronic transcripts for up to two years following graduation, with a nominal fee after that. Students can request their transcripts be sent directly to any college or university, or any other entities that may require transcripts.

1.2   Features

The following are key features of the Data Transport System:

- Web-based system

- One point of entry for all Data Transport functions

- Data submission via various methods:

  - o Batch
  - o Online
  - o SFTP (available January, 2016)

- Data updated on an ongoing basis

- Submission process managed with:

  - o Workflows for submitting and certifying data
  - o Views of data submitted prior to posting to the system

- A complete profile of a student's transcript information for demographic, course, and assessment information

- Data for an individual student submitted online

- Reporting capabilities including:

- A view of data stored in the system prior to certification
- The ability to print reports as well as download reports in Comma-Separated Values (CSV), Excel, etc. formats
- The ability to filter report data based on user-selected filters

2.   System Overview

An overview of the Data Transport System and its operating environment is described in the following sections:

- Intended Users
- Solution Components
- Activities Supported

2.1   Intended Users

The Data Transport System is designed to accommodate the diverse needs of various users and interfacing systems. The system will accommodate several types of interactions: user interactions, system interactions, and interface interactions. Figure 2-1 below depicts these interaction points at a high level.

Figure 2-1: Interaction Types
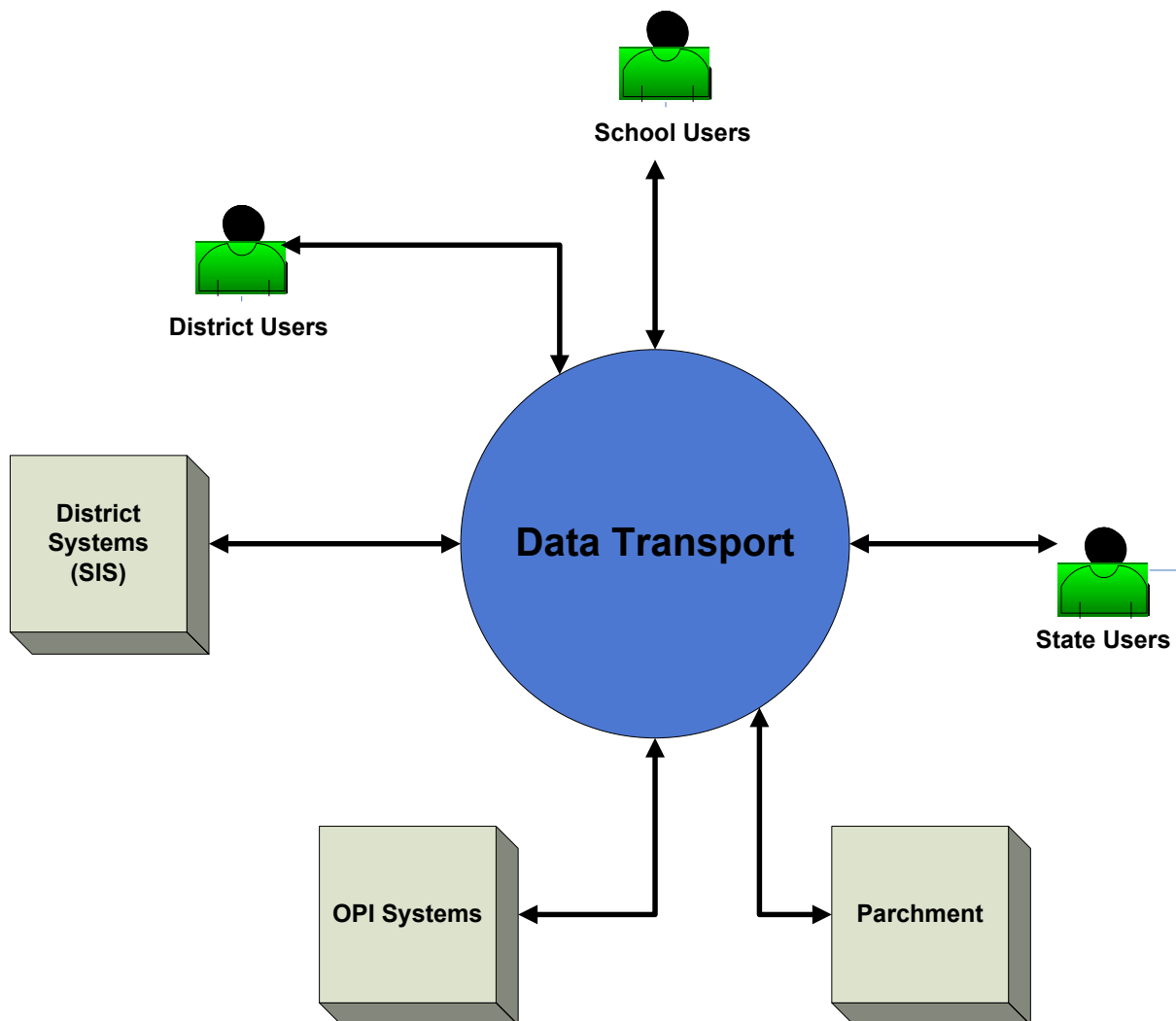
Each of these interactions will have different needs. Therefore, the system will provide different capabilities depending on the type of interaction. Instructions Table 2-1 below describes each of these interactions.

Instructions Table 2-1: User Interactions

User Interaction	Interaction Description
District User	• Manage demographic updates, course updates, and assessment updates • Validate data submitted • Certify transcript data
School User	• Make demographic updates, course updates, and assessment updates • Validate data submitted • Certify transcript data
State User	• Administer users • Review transcript data and reports
System Interactions	**Interaction Description**
District Systems	• Provide data directly to the Data Transport System
Interface Interactions	**Interaction Description**
Parchment	• Receive certified transcript data

OPI Interfaces	• Provide and receive data to and from the following external systems and processes
	
	   o AIM
	   o TEAMS
	   o Central

2.2   Solution Components

The components of the Data Transport System supporting the interactions above are depicted in the graphic below in Figure 2-2.

Figure 2-2: Solution Components
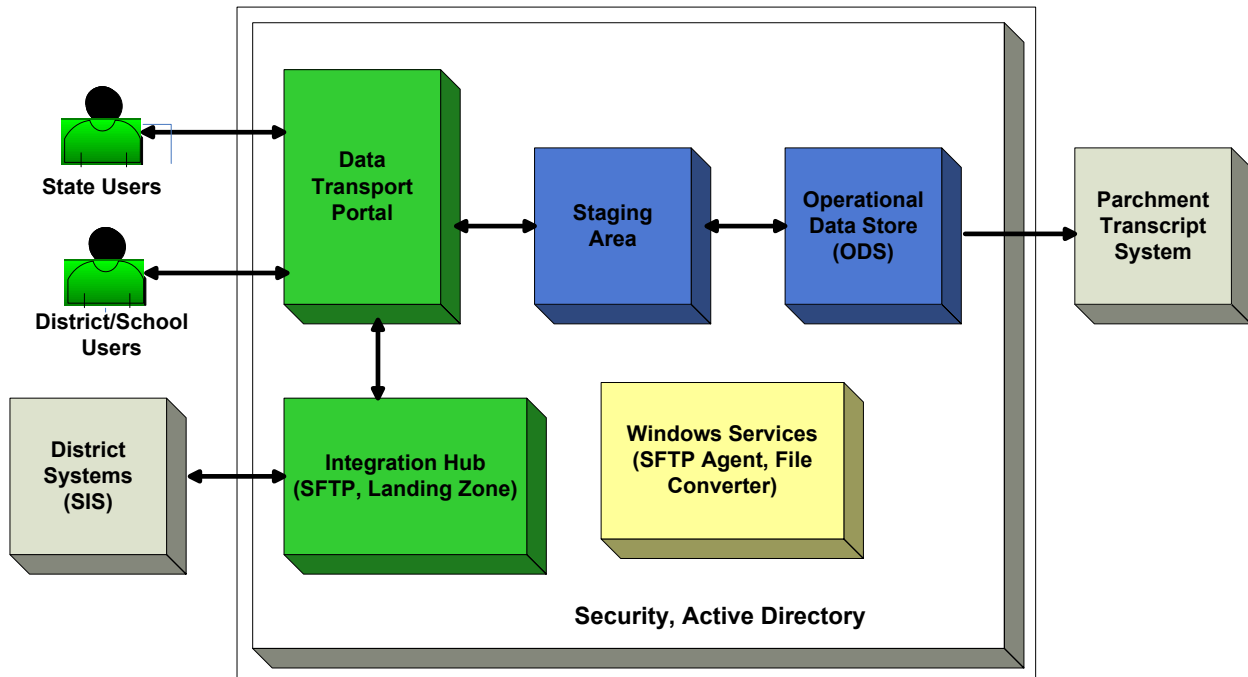
Each of these components is described in Instructions Table 2-2 below.

Instructions Table 2-2: System Component Descriptions

Component	Description
Data Transport Portal	The Portal component will provide users with the ability to: District/School Users • Submit transcript data via batch or online • Review District specific information regarding data submissions • Perform reporting activities State Users • Administer Data Transport user accounts • View data
Staging Area	The Staging Area is the temporary storage for District/School submitted data until this is corrected, validated, and approved for loading to the Operational Data Store (ODS). The Staging Area is the initial data loading point for all data submission.
Operational Data Store (ODS)	The ODS captures and maintains all validated student transcript related data submitted by the districts and schools. This data store is the source for reporting and data extraction.
Integration Hub	The Integration Hub is a logical component of Data Transport that contains SFTP Landing Zone. (available January, 2016) • The Landing Zone is temporary storage for all incoming files to the Data Transport System. Data from the file submissions are processed at the Landing Zone before they are posted to the Staging database.

Component	Description
Parchment Transcript System	The eTranscript System receives certified transcript data from the Data Transport System.

3. Navigation

The Data Transport System was designed with ease of user navigation in mind. The Data Transport "Home Page" appears upon successful login by the user. The Tab Panel is displayed at the top of each page within the system. This series of tabs allows the authorized user to move directly between interfaces and return to the "Home Page" as needed. Through these tabs, the user may navigate directly to the interface where they need to perform a specific task or acquire the information they need. Access to interfaces, functional areas, and functions the user may perform is determined by the user's authorization. Areas for which a user is not authorized will either be hidden from the user or inactivated. The user may also click on the Help Link from this page or any other page to access the Data Transport System's online Help information. Within each of the user interfaces and functional areas, the user is led through the pages with clearly labeled, logical buttons and links.

3.1 Tabs

Tabs for each of the Data Transport interfaces are found across the top of the Home Page as well as all other pages in the system. The tab for an area will be active if the user has authority to use that interface. Once a main tab is selected, a subset of additional tabs may appear on a second row allowing the user to access to sub-menus within the system. An example of the Data Transport navigational tabs for a district administrator user is shown in Figure 3-1.

Figure 3-1: Submenus (District administrator user role)
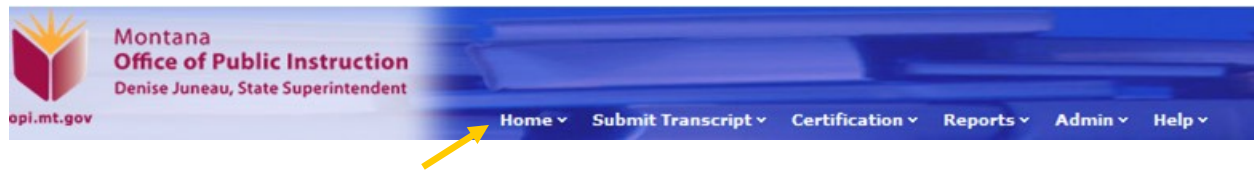
The user may select the Home Tab at any time to return to the Data Transport "Home" page.

An example of the Data Transport navigational tabs for a report user is shown in Figure 3-2.

Figure 3-2: Submenus (Report user role)
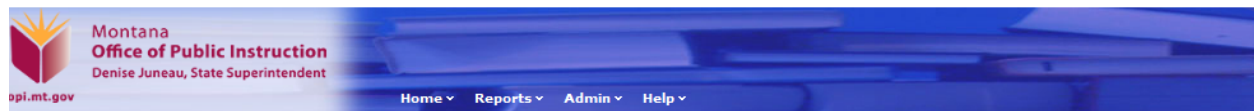
3.2 Sub-Menu Link

Links are used throughout Data Transport to allow a user to move logically from one page to another. They are denoted by underlined text. In some instances, when a user accesses an interface, they will be presented with links to sub-menus that allow them to move quickly into the desired area. An example is shown in Figure 3-3.

Figure 3-3: Sub-Menu Links
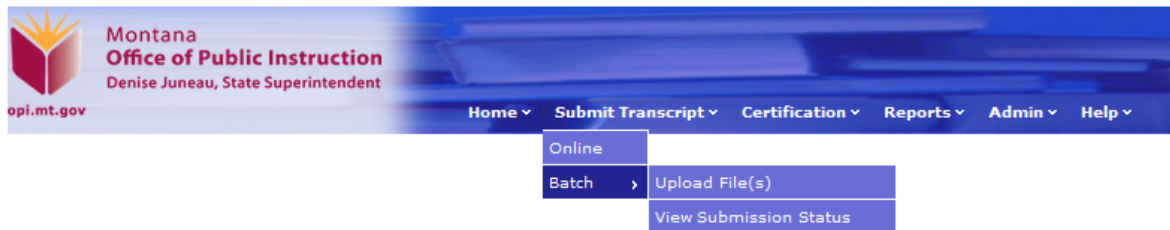
3.3   Filter Options

Many of the Data Transport System pages allow the user to view lists of data. In most cases, where there are large amounts of data to be displayed, the user has the option of using filters to refine the data displayed in order to locate the information needed more easily. In each instance where filter options are used, the user will be presented with several options from which they may choose. In general, the user can utilize fewer options for a broader search and multiple options for a more refined search of the data. When filter options are available, the screen will display two action buttons – Apply Filters and Reset Filters. When the user selects the Apply Filters button, the system conducts a search based on the user's selections. When the Reset Filters button is selected, the system resets all options to their default values. Specific instructions for the filter options in a particular interface are included in their relevant sections. An example is shown in Figure 3-3.

Figure 3-4: Filter Options

3.4   Links

Links provide a way for the user to move from the current page to a page containing additional information. Links are denoted by underlined text. As mentioned previously, links are sometimes used as part of the Data Transport menu system but there are other uses as well. Throughout the Data Transport System, there are many instances in which the system displays data with a count of records for that specific type of data. If the count is underlined, the user may click on that count link to view the details of that count. In other instances, a field name may be in blue and therefore linked to the detailed information about that field. See Figure 3-4 for examples of Links.
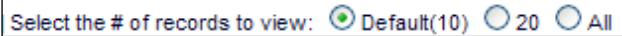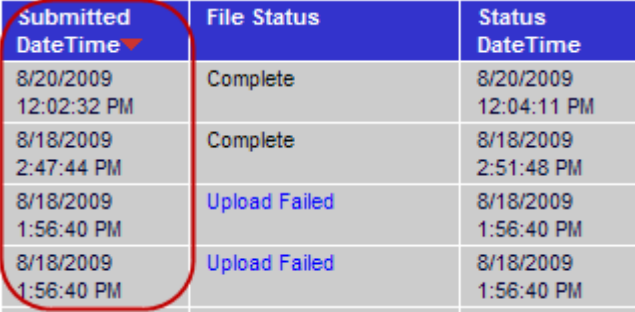
Figure 3-5: Links

Job ID	Job Name	File Type	Submitter	Submitted Date/Time	File Status	Status Date/Time	Total Records	Passed	Rejected	Remove	Archive
2643	2754.csv	Course Record	CP3302	2/3/2015 3:25:28 PM	In Review	2/3/2015 3:30:23 PM	25	23	2		
2556	2747.csv	Demographic Record	CP3302	1/28/2015 3:23:06 PM	In Review	1/28/2015 3:24:12 PM	6	5	1		
2546	2446 Test 8 Demographics v2.csv	Demographic Record	CP3302	1/28/2015 1:40:32 PM	In Review	1/28/2015 1:42:20 PM	6	5	1		
2351	1027.csv	Demographic Record	CP3302	1/5/2015 12:46:55 PM	In Review	1/5/2015 12:48:13 PM	11	10	1		

3.5   Navigating Within a Page

Frequently, the Data Transport System user is working with large amounts of data. Page navigational items are designed to help the user move efficiently through the data and to provide an indication of the subset of data the user is currently viewing. Some tools also allow a user to organize the data being viewed (e.g. sorting columns). Page Navigation items are included in Instructions Table 3-1.
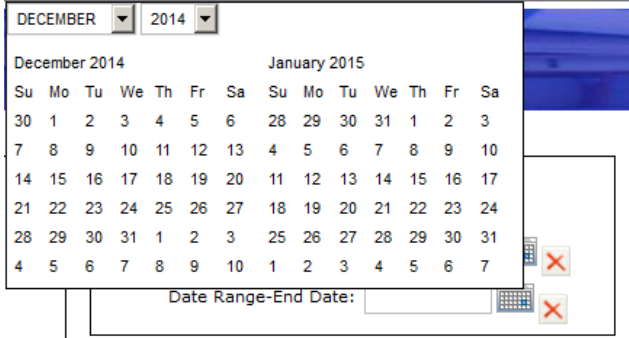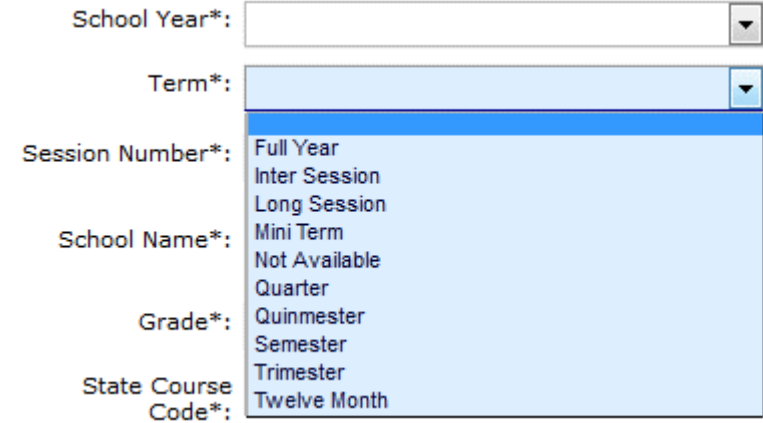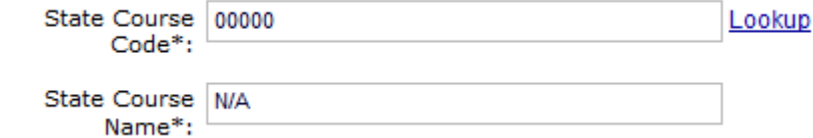
Instructions Table 3-1: Navigating Within a Page

	Page Navigation	Description
1	Navigating through pages of data Select the # of records to view: ⦿ Default(10) ○ 20 ○ All	The system will default to show up to ten results per page. To see more, select either the twenty or ALL radio button.
2	Page Number Display Viewing page 1 of 134 1 2 3 4 5 6 7 8 9 10 ...	The page display shows the current page being displayed and the total number of pages for that list. The user may select a page number to view.
3	Total Records Display Displaying 1 - 10 of 1339 Records	The total records show the number of records returned which may be viewed.
4	Sorting data in a list. 	Submitted DateTime	File Status	Status DateTime
---	---	---
8/20/2009 12:02:32 PM	Complete	8/20/2009 12:04:11 PM
8/18/2009 2:47:44 PM	Complete	8/18/2009 2:51:48 PM
8/18/2009 1:56:40 PM	Upload Failed	8/18/2009 1:56:40 PM
8/18/2009 1:56:40 PM	Upload Failed	8/18/2009 1:56:40 PM		To sort a particular column, the user may select a column heading link. The red arrow in the column heading indicates that the column can be sorted. The first click on the field name orders records in ascending order; the second click orders records in descending order.
5	Alphabet Bar All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z	The user may select a letter to limit the display of the list to items that begin with that letter.

3.6   Data Tools

There are many tools throughout the Data Transport System to help the user move through the system and enter data efficiently. Several of these tools are highlighted in Instructions Table 3-2.

Instructions Table 3-2: Data Tools
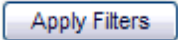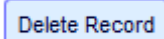
Navigation Tools		Description
1	Calendar Tool 	When the user selects the calendar icon, the system displays an interactive calendar from which the user can select a date. The text box will then be populated with the selected date. This ensures that the date will be entered in the correct format.
2	Dropdown Box 	When the user selects the arrow button, a list of valid data for that field will display. The dropdown list is generally used for shorter lists of data.
3	**Lookup** Link 	When the user selects the Lookup link next to the State Course Code, the system will look up the value for the data entered and populate the State Course Name for the State Course Code entered.
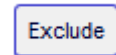
3.7   Action Buttons

Almost every page in the Data Transport System will include clearly labeled button(s) which the user will select to take some kind of action. Some of these buttons are simply related to

navigating through the system and others instruct the system to take specific actions for that interface and data. Depending on the authority of a user, some buttons may be inactive. In other instances, buttons may be active at only specific times depending on the transactions that are taking place. Many of the buttons are described in general terms in Table 3-3. The individual instructions for each interface and function of the system include specific instructions for each button.

Instructions Table 3-3: Action Buttons

Action Buttons	Description
1 Search (Search Button)	If selected, the system will begin a search.
2 Reset (Reset Button)	If selected, the system will reset any fields that have been changed.
3 Submit (Submit Button)	If selected, the system will perform the user's selected operation on the interface and return the matching data or appropriate error message.
4 Cancel (Cancel Button)	If selected, the system will cancel the process.
5 Apply Filters (Apply Filters Button)	If selected, the system will begin a search based on the selected filter.
6 Reset Filters (Reset Filters Button)	If selected, the system will reset all filter options to their default values.
7 Return to (Return to xxxx Button)	If selected, the system will return to the page indicated in the button. See specific interface instructions areas for detailed information.
8 **Edit** (Edit Link)	If selected, the system will move from read only mode into edit mode allowing the user to edit the data.
9 **Delete** (Delete Link)	If selected, the system will display the read only detail view of the record for the user to review before clicking the Delete Record button.
10 Delete Record (Delete button)	If selected, the system will display a message for the user to confirm the deletion and will then either cancel the process or remove the record from the ODS.
11 Add Record (Add Record button)	If selected, the system will display the detail page so the user may create a new record.
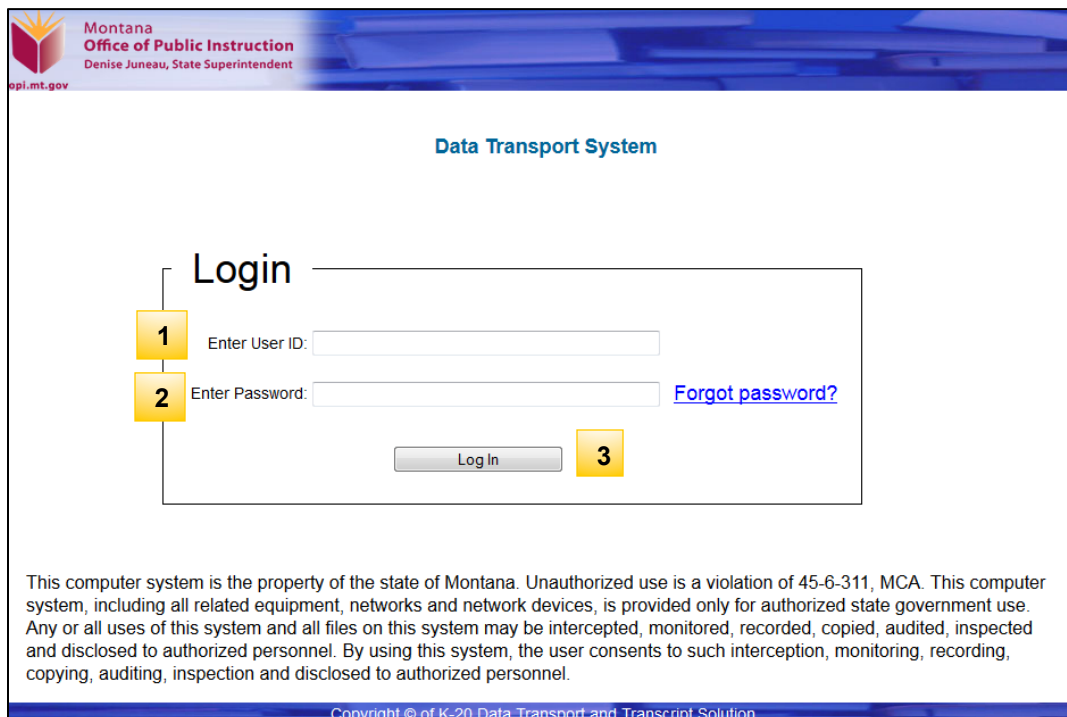
Action Buttons		Description
12	Validate (Validate Button)	If selected, the system verifies that the data entered are valid. No data is saved during this process.
13	Post (Post Button)	If selected, the system will save the data.
14	Exclude (Exclude Button)	If selected, the system will exclude the records from posting.

4. Data Transport System Login

The Data Transport "Login" page allows an authorized user, who has been assigned a User ID and Password, to log into the Data Transport System. The role(s) assigned to users determine which interfaces the user can access and which functions the user can to perform. The user system roles and system access levels are set according to the OPI specifications and are assigned to each user by an OPI security administrator. The user may use the Forgot Your Password link to retrieve his/her password. Upon successful login, the Data Transport "Home Page" is displayed, allowing the user to navigate to specific applications throughout the system.

User roles and system access levels are set according to the OPI specifications. The assigned role determines which interfaces the user has permission to access and which functions the user can perform. The user may access the portal once a User ID and Password are obtained.

Screen 4-1: Data Transport Login Page

Instructions Table 4-1: Login to Data Transport

Step by Step Screen Instructions		Special Instructions
1	Enter the User ID in the text box	Must be a valid User ID assigned by an OPI Security Administrator.
2	Enter the Password in the text box Note: If you are unable to log in, contact your OPI Data Transport Help Desk	The user will login with the same password as is used for other OPI systems. Upon first login to DTS, the user will be required to setup security questions and answers that can be used in the future if a password is forgotten. See Screen 4-2 below. Three login attempts are allowed. If these attempts fail, the user will be locked out of the system for ten minutes, at which point the user can attempt to log in again.
3	Log In (Log In Button)	If selected, the system will verify the User ID and Password entered with the Data Transport account information and display the Data Transport "Home Page" or the appropriate error message.
Optional Functions		
Forgot password?		If selected, the system will direct the user to the "Forgot Password" page.

Instructions Table 4-2: Login to Data Transport

Step by Step Screen Instructions		Special Instructions
1	Select a security question for the Security Question 1 field and provide the answer to the question in the text box to the right	The question must be different from Security Question 2.
2	Select a security question for the Security Question 2 field and provide the answer to the question in the text box to the right	The question must be different from Security Question 1.
3	Submit	The value entered must be the valid current/temporary password.
6	Submit (Submit Button)	If Submit button is selected, the answers to the Security Questions will be stored in the user's Data Transport account profile and the user will be prompted to redirect to the Data Transport System.
Optional Functions		

Cancel (Cancel Button)	If the Cancel button is selected, the password will not be changed and the user will be directed back to the login screen.

5.   Forgot Password

This Forgot Password function allows an authorized user to reset a forgotten password stored in the user's Data Transport account profile. The "Forgot Password" page is displayed when a user selects the Forgot Your Password link on the Data Transport Login page.

Screen 5-1: Forgot Password
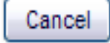
Instructions Table 5-1: Forgot Password

	Step by Step Screen Instructions	Special Instructions
1	The user's User ID will be pre-populated with the value provided on the login screen. If the user did not provide the User ID, the user must enter the User ID for the password to be reset on this screen.	User ID is entered in the Enter User ID field
2	Select a previously set security question for Security Question 1 using the dropdown list, then provide the answer to the question in the text box to the right.	The value entered must be a valid answer to the password challenge question that was previously set up upon first login or in Administration > Manage User Profile.
3	Select a previously set security question for Security Question 2 using the dropdown list, then provide the answer to the question in the text box to the right.	The value entered must be a valid answer to the password challenge question that was previously set up upon first login or in Administration > Manage User Profile. Both questions must be answered in order to reset the password.
4	Submit (Submit Button)	If selected, the system will validate the provided answers to the questions. If valid, the system will email a new temporary password to the email account stored in the user's profile. If the answer is invalid, the system will display an error message.

Optional Functions	
Cancel (Cancel Button)	If the Cancel button is selected, the password will not be retrieved and the user will be directed back to the login screen.

6. Data Transport System Home Page

The Data Transport "Home" page allows an authorized user to view the status of the user's Data Transport System activities. The "Home" page is displayed upon successful login.

Screen 6-1: Data Transport Home Page

The "Home" page is divided into the following sections:

- Data Transport Notifications: This section will display notifications generated by the Data Transport Team, such as scheduled system maintenance.

- Certification Status: This section will provide the certification status of the records in the ODS.

- Status of Submissions: This section will provide the user with the status of each file submission.

7.   Administration

Access to each Administration link is limited by the user's assigned security level and roles:

• The User Security link is accessible to State user security and State administrators

• The Manage User Profile link is accessible to all roles and provides access to manage security questions and change a user's current password

The "Administration" page is accessed through "Admin" as indicated in the
Screen 7-1 image below.

Screen 7-1: Admin Landing Page
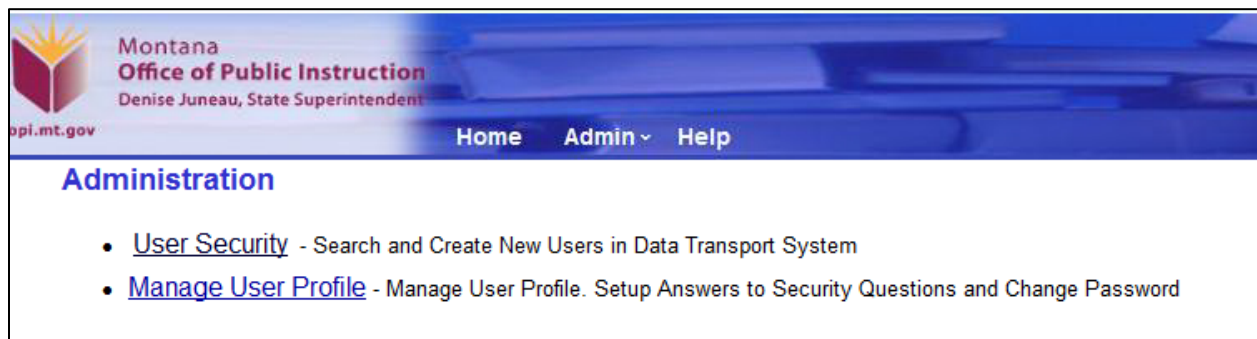
Access to each Administration link is limited by the user's security level and roles assigned:

• The User Security link is accessible to State Administrators and State Security Administrators

• The Manage User Profile link is accessible to all users

7.1 Manage User Profile

The Manage User Profile link allows an authorized user to access the appropriate page to manage the user's security questions. It is selected from the Admin tab. The "Manage Security Questions" portion of the "Manage User Profile" page allows the user to manage the answers to security questions that are used on the "Forgot Password" page. The answers to the security questions provided here are stored in the user's Data Transport account profile.

Additionally, a user will have the option to change their password. The Manage User Profile page is accessed through Admin as indicated in the Screen 7-2 image below. NOTE: Passwords expire after sixty days. If the user does not reset the password within seven days of its expiration, the user can call the Data Transport Help Desk for assistance with a reset.

Screen 7-2: Manage User Profile (View)

Screen 7-3: Manage User Profile (Modify)

7.1.1 Manage Security Questions

The Manage User Profile link allows an authorized user to access the page that sets up or edits the user's security questions. The Manage Security Questions portion of the Manage User Profile page allows the user to manage the answers to security questions that are used on the Forgot Password page. The answers to the security questions provided here are stored in the user's Data Transport account profile.

Screen 7-4: Manage Security Questions (View)

Screen 7-5: Manage Security Questions (Modify)

Instructions Table 7-1: Manage Security Questions

Step by Step Screen Instructions		Special Instructions
1	Change Questions and Answers Change Questions and Answers button	If "Change Questions and Answers" is selected, the answers to the Security Questions will be enabled for a user to modify the security questions and answers.
2	Select a security question for the Security Question 1 field and provide the answer to the question in the text box to the right	The question must be different from Security Question 2.
3	Select a security question for the Security Question 2 field and provide the answer to the question in the text box to the right	The question must be different from Security Question 1.
4	Submit (Submit Button)	If "Submit" is selected, the answers to the Security Questions will be stored in the user's Data Transport account profile and will be used if the user chooses to reset a forgotten password.

Optional Functions	
Reset (Reset Button)	If selected, the Reset button resets all fields to the default value.
Cancel (Cancel Button)	If selected, the Cancel button returns the user to the Admin landing page.

7.1.2 Change Password

A user can access this page after a new account or temporary password has been issued. The new password entered here will be stored in the user's Data Transport account profile.

Screen 7-6: Change Password

Instructions Table 7-2: Change Password

Step by Step Screen Instructions		Special Instructions
1	Enter current/temporary password	The value entered must be the valid current/temporary password.
2	Enter new password in the New Password field	Password must: • Be at least eight characters and up to fifteen characters in length • Contain at least one uppercase letter • Contain at least one lowercase letter • Contain at least one of the non-alphanumeric characters ~ ! @ # $ % ^ & * ( ) - = _ + ? < > , . : ; { } [ ]	\ / " ' Password must not be: • Same as the User ID • Same as the previous six passwords
3	Re-enter new password in the Confirm Password field	The password must be the same as the password entered in the New Password field.
4	Submit (Submit Button)	If Submit button is selected, the passwords entered will be validated. If the passwords pass the validation, they will be stored in the user's Data Transport account profile.

Optional Functions	
Reset (Reset Button)	If selected, the Reset button resets all fields to the default value.

8. Submit Transcript

The Submit Transcript tab function allows an authorized user to perform the functions necessary for maintaining and submitting student transcript data. These functions are organized into two categories:

- Online
- Batch

The authorized user may access their district's data categorized in the following file types:

- Demographics
- Course
- Assessment

The Submit Transcript functions are divided into the following categories:

- Online – Through this option, the user may enter and maintain student data individually (one record at a time)
- Batch – This option allows a user to submit and maintain multiple entries of student information through batch files.

Each of the Submit Transcript function categories listed above is a menu tab which, when selected, will display sub-menu links for the authorized user to perform the required functions within each of those categories.

8.1 Online

The Online function under the Submit Transcript tab allows authorized users to manage student transcript data individually. This function allows users to access student data by searching for an individual student by State ID or by viewing a list of students based on available filter options. The system will provide the appropriate links to access an individual's Demographic, Course, and Assessment data. Information may be entered, updated, and maintained in all of these areas. A user may only view or edit data owned by their district.

8.1.1 Student Search

The "Student Search" page provides an authorized user with the ability to search for a student in order to conduct maintenance on individual student's data. It is accessed when the user selects Online from the Submit Transcript menu.

The three search methods are:

1. Search by State ID: The user may utilize the Search by State ID option if the State ID is known.

2. Search by District or School: The user may utilize the Search by District or School option if the user knows the district in which the student is located. The district or school search option designates the system to search for all student records matching the selected district or district/school value. The system returns a maximum of a 1,000 records at a time.

3. Search by Demographics: The user may utilize the Search by Demographics option if the State ID is not known but at least one demographic fields is known. Partial information is allowed. The system will utilize the data entered in the fields to filter records during the ODS search process.

Screen 8-1: Search for Student

Student Search

Filter Options

1 ● Search By State ID

State ID: [   ] **2**

3 ○ Search By District or School

*Select District: [▼] **4**

Select School: [▼] **5**

6 ○ Search By Demographics (Use * character to specify partial criteria)
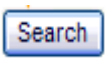
Student First Name: [   ]
Student Last Name: [   ] **7**
Student Birth Date [   ] ▦ ✕
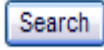
8 [Search]   [Reset]

Instructions Table 8-1: Student Search – Search by State ID
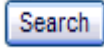
Step by Step Screen Instructions		Special Instructions
1	Select the Search by State ID Radio button	Verify the Search by State ID radio button is selected.
2	Enter a State ID	This is a required field.
8	Click on the Search button [Search]	If selected, the search will be initiated. If the search is successful, the user will be directed to the "Student List" page.

Optional Functions	
[Reset] (Reset Button)	If selected, all fields will be restored to the default values.

Instructions Table 8-2: Student Search –Search by District or School

Step by Step Screen Instructions		Special Instructions
3	Select the Search by District or School radio button	Verify the Search by Search by District or School radio button is selected.
4	Select the District using the Dropdown	This is a required field.
5	Select the School using the Dropdown	This is an optional field.
8	Click on the Search button Search	If selected, the search will be initiated. If a match is determined the user will be directed to the "Student List" page.

Optional Functions	
Reset **Reset** Button	If selected, all fields will be restored to the default values.

Instructions Table 8-3: Student Search –Search by Demographics

Step by Step Screen Instructions		Special Instructions
6	Select the Search by Demographics radio button	Verify the Search by Demographics radio button is selected.
7	Add all or part of the Demographic information	If entering partial information, place an asterisk (*) before, in the middle of, or at the end of the information. Also, you can search using any one field (you do not need to populate all fields).
8	Click on the Search button Search	If selected, the search will initiate. If a match is determined, the user will be directed to the "Student List" page.

Optional Functions	
Reset (Reset Button)	If selected, all fields will be restored to the default values.

8.1.2 Student List

The "Student List" page allows an authorized user to view one or more student records from the ODS in the user's district and/or school. It displays when the user selects a radio button on the "Student Search" page and performs a search.

Based on the user selected filter criteria, a list of students is displayed at the bottom half of the screen. The top half of the screen also allows for modification of the filter criteria. Once the list is produced, the user may continue to refine this list by selecting a letter from the Student Last Name alphabet bar to display only those students with last names beginning with the selected letter.

Screen 8-2: Student List

Student Search

Filter Options

2 ⦿ Search By State ID **1**

State ID: [_____]

3 ◯ Search By District or School

*Select District: [_____▼]

Select School: [_____▼]

4 ◯ Search By Demographics (Use * character to specify partial criteria)

Student First Name: [_____]

Student Last Name: [_____]

Student Birth Date: [_____] ▦ ✕

5 [Search]   [Reset]

Student Last Name

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z **6**

[Return to Student Search]

Student Details

Displaying 1 - 1 of 1 Records | **Viewing page 1 of 1** | Select the # of records to view: ⦿ Default(10) ◯ 20 ◯ All

Student Name	Local Student ID	State ID	Student Gender	Student Birth Date	School Name
ADAMS,				1998	
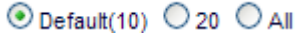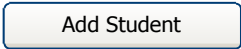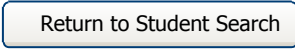
Displaying 1 - 1 of 1 Records | **Viewing page 1 of 1** | Select the # of records to view: ⦿ Default(10) ◯ 20 ◯ All

[Return to Student Search]

7

[Add Student]

Instructions Table 8-4: Student List

	Step by Step Screen Instructions	Special Instructions
1	The criteria entered through the original student search page is displayed in these fields	Additional information may be entered here to conduct a new search through this page. Modify any field and select the Search button.
2	To use the Search by State ID filter option, enter a State ID	A value must be selected before clicking on the Search button.
3	To use the Search by District or School filter option, enter a district or enter a district and school	A value must be selected before clicking on the Search button.
4	To use the Search by Demographics filter option, enter data in one or more of the fields	A value must be selected before clicking on the Search button.
5	Once the required filter options are selected, click the Search button to produce the student list based on the filters values chosen	
6	To further refine the list of results, select the first letter of the student's last name from the alphabet bar	Only those records starting with the selected alphabet letter, in addition to the user specified filter values, will display.
7	Click on the Student's Name link to view additional student details	The Student Information page will display for that student.

Optional Functions	
Search Button [Search]	Click this button to modify the search criteria.
Reset button [Reset]	Click this button to restore all filter fields to the default values.
Student Name	Local Student ID	State ID	Click on any column heading links to sort the results. The first click on the field name provides records in ascending order. The second click provides information in descending order.

Optional Functions	
⦿ Default(10) ○ 20 ○ All	The system will default to show up to ten results per page. To see more, select either the twenty or ALL radio buttons.
1 2 3 4 5 6 7 8	If multiple pages of results are returned, navigate through the pages by selecting the page number of the page to display.
Add Student button [Add Student]	Click this button to add a new student to the ODS.
Return to Student Search [Return to Student Search]	Click this button to return to the "Student Search" page.

8.1.3 Student Information

The "Student Information" page provides an authorized user access to functions which are used to maintain student data. It displays when the user selects a Student Name link on the "Student List" page.

The system will display the student's key elements at the top portion of the Selected Student Details box. The following links will display at the bottom portion and direct the user to the appropriate pages to maintain the selected student data category:

- Demographics Link - If selected, the system will display the Demographics History page where the user may view the student's Demographic History and maintain the Demographic Data.

- Course Link - If selected, the system will display the Course History page where the user may view the student's Course History and maintain the Course Data.

- Assessment Link - If selected, the system will display the Assessment History page where the user may view the student's Assessment History and maintain the Assessment Data.

Screen 8-3: Student Information
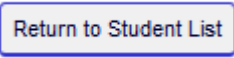
Instructions Table 8-5: Student Information

Step by Step Screen Instructions		Special Instructions
1	Click on the Demographics, Course, or Assessment link to view the history pages	The Demographics, Course, or Assessment history page will display for the selected student.

Optional Functions	Special Instructions
Return to Student List **Return to Student List** Button	Clicking on this button will return the user to the "Student List" page.

8.1.4 Demographic History

The "Demographic History" page allows a user to view the student's demographic record and navigate to other pages in order to make additions and updates. This page is accessed when a user selects the Demographics link on the "Student Information" page.

The selected student's key elements appear across the page.

Through this page, the authorized user may:

• View the demographic record

• Update the demographic record by selecting the Edit link. The system will pre-populate existing information for the user to modify.

• Delete the record by selecting the Delete link. The system will display the record for the user to review before deletion.

• Return to the "Student Information" page

Screen 8-4: Demographics History

Instructions Table 8-6: Demographic History

Step by Step Screen Instructions	Special Instructions
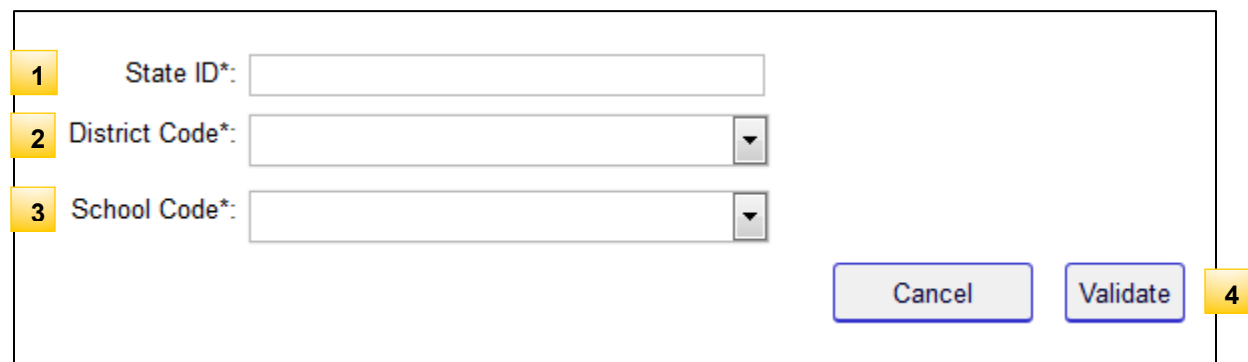
Step by Step Screen Instructions		Special Instructions
1	Review the record to determine if updates are needed.	If the user is authorized to update existing records or to delete a record, the system will display Edit and Delete links next to the record.

Optional Functions	
Edit Edit link	An Edit link will appear next to each existing record the user is authorized to modify. This link may be selected to modify the existing record.
Delete Delete link	A Delete link will appear next to each existing record the user is authorized to delete. This link may be selected to delete the existing record.
Return to Student Information Return to Student Information button	Click this button to return to the "Student Information" page.

8.1.5 Demographics Student ID

The "Demographics Student ID" page allows an authorized user to enter a student's State ID and select the associated district and school. It is accessed by clicking the Add Student button on the "Student Search." The system will validate if the State ID is valid and if the State ID has an associated enrollment with the selected district and school. If the State ID is not valid for the data entered, the system will display an error message and the user must correct the information to proceed. A school or district user can never access a student not currently enrolled in that user's school or district. If a valid student is entered, the system will take the user to the Demographics Detail page. Refer to Section 8.1.6.

Screen 8-5: Demographics State ID
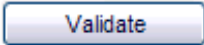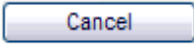
Instructions Table 8-7: Demographics State ID

	Step by Step Screen Instructions	Special Instructions
1	The State ID field will be *Blank* To add the value, enter the State ID in the provided text box	This is a required field.
2	The District Code field will be populated with the user's District	This is a required field.
3	The School Code field will be populated with the user's school. To change the value, use the school drop down to select the appropriate school. A district level user will only be able to change the school drop down value.	This is a required field.
4	Validate To validate the edited information, select the Validate button	The system will check the entered data against AIM. If this data does not pass the validation, the system will display the error message" State ID must be a valid OPI ID in the database and have an enrollment associated with the District". If this data passes the check, the system will display the "Demographics Detail" page.

Optional Functions	
Cancel (Cancel Button)	Click this button to return to the "Student Details" page without saving any information entered.

8.1.6 Demographic Detail

The "Demographic Detail" page allows an authorized user to add or update a student's demographic information. It is accessed through the following actions:

- Clicking the Edit link on the "Demographic History" page
- Clicking the Delete link on the "Demographic History" page
- Successfully validating the State ID and school information on the "Demographic State ID" page.

There are four sections associated with the "Demographic Detail" page: School Information, Student Information, Graduation Information, and Immunization Information. If the user clicks the Edit link, the fields on these pages display those values from the student's selected record.

If the Delete link is clicked, the fields on all the pages are displayed as non-modifiable and a Delete button will be available.

If the user navigates to the page when entering a new student, the following fields will be pre-populated:

- School System Name
- School Name
- School Address Line One
- School Address Line Two
- School City
- School State
- School ZIP Code
- School Phone
- Student First Name
- Student Last Name
- Student Middle Name
- Suffix
- Student Birthdate
- Student Gender
- Enrollment Start Date
- Exit Date
- Graduation Year

Screen 8-6: Demographic Detail (Edit/Add Option)
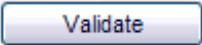
Student Name	Local Student ID	State ID	Student Gender	Student Birth Date	School Name
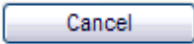
1 School Information | Student Information | Graduation Information | Immunization Information

Cancel   Validate   **2**

Instructions Table 8-8: Demographic Detail (Add/Edit Option)

	Step by Step Screen Instructions	Special Instructions
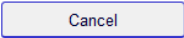
	Step by Step Screen Instructions	Special Instructions
1	Use the links at the top of the page to navigate to each demographic detail section: School Information, Student Information, Graduation Information, and Immunization Information.	For each section (School Information, Student Information, Graduation Information, and Immunization Information), review all existing data to determine if the data need to be updated.
2	Validate To validate the edited information to submit, select the Validate button.	The system will run all Input Validation Rules (IVR) against the data. If the entered data does not pass the IVR, a "Validation Results" box will appear at the top of the screen listing the specific errors. The Cancel button must be selected to correct the data. If the entered data passes the IVR, post the data by choosing the Post button.
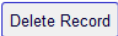
Optional Functions	
Cancel (Cancel Button)	Click this button to return to the "Student Information" page without saving any information entered.
Return to Top (Return to Top Link)	Click this link to return to the top of the "Demographic Detail" page.

Screen 8-7: Demographic Detail (Delete Option)
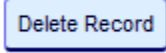
Student Name	Local Student ID	State ID	Student Gender	Student Birth Date	School Name

School Information | **Student Information** | **Graduation Information** | **Immunization Information**

Cancel
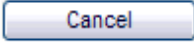
1 Delete Record

Instructions Table 8-9: Demographic Detail (Delete Option)

	Step by Step Screen Instructions	Special Instructions
1	Delete Record To delete record, select the Delete button.	To delete the record entirely, select the Delete Record button. The system will ask to confirm deletion. Depending on the user selection, the system will then either cancel the process or remove the record from the ODS. If the user deletes the demographic record, all course and assessment records will also be deleted.

Optional Functions	
Cancel (Cancel Button)	Click this button to return to the "Student Information" page without saving any information entered.
Return to Top (Return to Top Link)	Click this link to return to the top of the "Demographic Detail" page.

Screen 8-8: Demographics Detail – School Information (Edit/Add Option)

School Information

1	School Name*:	
2	School System Name*:	
3	School Address Line One*:	
4	School Address Line Two:	
5	School City*:	
6	School State*:	▾
7	School ZIP Code*:	
8	School Phone*:	

Instructions Table 8-10: Demographic Detail - School Information (Edit Option)

	Step by Step Screen Instructions – Edit	Special Instructions
1	The School Name field will be populated with the value for the record that was selected on the "Demographic History" page. To change the value, update the text box.	This is a required field.
2	The School System Name field will be populated with the value for the record that was selected on the "Demographic History" page. To change the value, update the text box.	This is a required field.
3	The School Address Line 1 field will be populated with the value for the record that was selected on the "Demographic History" page. To change the value, update the text box.	This is a required field.
4	The School Address Line 2 field will be populated with the value for the record that was selected on the "Demographic History" page. To change the value, update the text box.	This is an optional field.
5	The School City field will be populated with the value for the record that was selected on the "Demographic History" page To change the value, update the text box.	This is a required field.

	Step by Step Screen Instructions – Edit	Special Instructions
6	The School State field will be populated with the value for the record that was selected on the "Demographic History" page. To change the value, select from the dropdown list.	This is a required field.
7	The School Zipcode field will be populated with the value for the record that was selected on the "Demographic History" page. To change the value, update the text box.	This is a required field.
8	The School Phone field will be populated with the value for the record that was selected on the "Demographic History" page. To change the value, update the text box.	This is an optional field.

Instructions Table 8-11: Demographic Detail - School Information (Add Option)

	Step by Step Screen Instructions – Add	Special Instructions
1	The School Name field will be pre-populated with the value from the OPI's Central database. To change the value, update the text box.	This is a required field.
2	The School System Name field will be pre-populated with the value from the OPI's Central database. To change the value, update the text box.	This is a required field.
3	The School Address Line 1 field will be pre-populated with the value from the OPI's Central database. To change the value, update the text box.	This is a required field.
4	The School Address Line 2 field will be pre-populated with the value from the OPI's Central database. To change the value, update the text box.	This is an optional field.
5	The School City field will be pre-populated with the value from the OPI's Central database. To change the value, update the text box.	This is a required field.
6	The School State field will be pre-populated with the value from the OPI's Central database. To change the value, select from the dropdown list.	This is a required field.
7	The School Zipcode field will be pre-populated with the value from the OPI's Central database. To change the value, update the text box.	This is a required field.
8	The School Phone field will be pre-populated with the value from the OPI's Central database. To change the value, update the text box.	This is an optional field.

Screen 8-9: Demographics Detail – Student Information (Edit/Add Option)

Student Information

1	Local Student ID:	
2	Student First Name*:	
3	Student Last Name*:	
4	Student Middle Name:	
5	Suffix:	
6	Parent/Guardian First Name:	
7	Parent/Guardian Last Name:	
8	Student Birth Date*:	
9	Student Gender*:	
10	Student Home Address Line One:	
11	Student Home Address Line Two:	
12	Student City:	
13	Student State:	
14	Student ZIP Code:	
15	Student Phone:	

Instructions Table 8-12: Demographic Detail - Student Information (Edit Option)

	Step by Step Screen Instructions – Edit	Special Instructions
1	The Local Student ID field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
2	The Student First Name field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is a required field.
3	The Student Last Name field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is a required field.
4	The Student Middle Name field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
5	The Suffix field will be populated with the value for the record that was selected on the "Demographic History" page. To change, select from the dropdown list.	This is an optional field.
6	The Parent/Guardian First Name field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
7	The Parent/Guardian Last Name field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
8	The Student Birth Date field will be populated with the value for the record that was selected on the "Demographic History" page. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is a required field.
9	The Student Gender field will be populated with the value for the record that was selected on the "Demographic History" page. To change, select from the dropdown list.	This is a required field.
10	The Student Home Address Line 1 field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.

	Step by Step Screen Instructions – Edit	Special Instructions
11	The Student Home Address Line 2 field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
12	The Student Home City field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
13	The Student Home State field will be populated with the value for the record that was selected on the "Demographic History" page. To change, select from the dropdown list.	This is an optional field.
14	The Student Zip Code field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
15	The Student Phone field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.

Optional Functions	
Date Icon	Click this icon to display the date calendar tool.

Instructions Table 8-13: Demographic Detail - Student Information (Add Option)

	Step by Step Screen Instructions – Add	Special Instructions
1	The Local Student ID field will be *Blank.* To add, enter the data in the text box.	This is an optional field.
2	The Student First Name field will be pre-populated with the value from AIM. To change, update the text box.	This is a required field.
3	The Student Last Name field will be pre-populated with the value from AIM. To change, update the text box.	This is a required field.
4	The Student Middle Name field will be pre-populated with the value from AIM. To change, update the text box.	This is an optional field.

	Step by Step Screen Instructions – Add	Special Instructions
5	The Suffix field will be pre-populated with the value from AIM. To change, select from the dropdown list.	This is an optional field.
6	The Parent/Guardian First Name field will be *Blank.* To add, enter the data in the text box.	This is an optional field.
7	The Parent/Guardian Last Name field will be *Blank.* To add, enter the data in the text box.	This is an optional field.
8	The Student Birth Date field will be pre-populated with the value from AIM. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is a required field.
9	The Student Gender field will be pre-populated with the value from AIM. To change, select from the dropdown list.	This is a required field.
10	The Student Home Address Line 1 field will be *Blank.* To add, enter the data in the text box.	This is an optional field.
11	The Student Home Address Line 2 field will be *Blank.* To add, enter the data in the text box.	This is an optional field.
12	The Student Home City field will be *Blank.* To add, enter the data in the text box.	This is an optional field.
13	The Student Home State field will be *Blank.* To add, select from the dropdown list.	This is an optional field.
14	The Student Zip Code field will be *Blank.* To add, enter the data in the text box.	This is an optional field.
15	The Student Phone field will be *Blank.* To add, enter the data in the text box.	This is an optional field.

Optional Functions	
Date Icon	Click this icon to display the date calendar tool.

Screen 8-10: Demographics Detail – Graduation Information (Edit/Add Option)

Graduation Information

1	Graduation Date:	
2	Enrollment Start Date*:	
3	Exit Date:	
4	GPA:	
5	GPA Type:	
6	Class Rank:	
7	Class Size:	
8	Diploma Type:	
9	Academic Honors 1:	
10	Academic Honors 2:	
11	Academic Honors 3:	
12	Academic Honors 4:	
13	Academic Honors 5:	
14	Rqrd No. of Credits for Graduation:	
15	Graduation Year*:	
16	Co-curricular 1:	
17	Co-curricular 2:	
18	Co-curricular 3:	
19	Co-curricular 4:	
20	Co-curricular 5:	

Instructions Table 8-14: Demographic Detail - Graduation Information (Edit Option)

Step by Step Screen Instructions – Edit	Special Instructions

	Step by Step Screen Instructions – Edit	Special Instructions
1	The Graduation Date field will be populated with the value for the record that was selected on the "Demographic History" page. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
2	The Enrollment Start Date field will be populated with the value for the record that was selected on the "Demographic History" page. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is a required field.
3	The Exit Date field will be populated with the value for the record that was selected on the "Demographic History" page. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
4	The GPA field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
5	The GPA Type field will be populated with the value for the record that was selected on the "Demographic History" page. To change, select from the dropdown list.	This is an optional field.
6	The Class Rank field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
7	The Class Size field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
8	The Diploma Type field will be populated with the value for the record that was selected on the "Demographic History" page. To change, select from the dropdown list.	This is an optional field.
9	The Academic Honors 1 field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
10	The Academic Honors 2 field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
11	The Academic Honors 3 field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.

	Step by Step Screen Instructions – Edit	Special Instructions
12	The Academic Honors 4 field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
13	The Academic Honors 5 field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
14	The Required Number of Credits for Graduation field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
15	The Graduation Year field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is a required field.
16	The Co-curricular 1 field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
17	The Co-curricular 2 field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
18	The Co-curricular 3 field will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
19	The Co-curricular 4 field will be populated with the value for the record that was selected on the "Demographic History" page To change, update the text box.	This is an optional field.
20	The Co-curricular 5 field will be populated with the value for the record that was selected on the "Demographic History" page To change, update the text box.	This is an optional field.

Optional Functions	
Date Icon	Click this icon to display the date calendar tool

Instructions Table 8-15: Demographic Detail - Graduation Information (Add Option)

	Step by Step Screen Instructions – Add	Special Instructions
1	The Graduation Date field will be *Blank.* To add, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
2	The Enrollment Start Date field will be will be pre-populated with the value from AIM. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is a required field.
3	The Exit Date field will be will be pre-populated with the value from AIM. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
4	The GPA field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
5	The GPA Type field will be *Blank.* To add, select from the dropdown list.	This is an optional field.
6	The Class Rank field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
7	The Class Size field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
8	The Diploma Type field will be *Blank.* To add, select from the dropdown list.	This is an optional field.
9	The Academic Honors 1 field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
10	The Academic Honors 2 field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
11	The Academic Honors 3 field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
12	The Academic Honors 4 field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
13	The Academic Honors 5 field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
14	The Required Number of Credits for Graduation field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
15	The Graduation Year field will be will be pre-populated with the value from AIM. To change, update the text box.	This is a required field.
16	The Co-curricular 1 field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.

	Step by Step Screen Instructions – Add	Special Instructions
17	The Co-curricular 2 field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
18	The Co-curricular 3 field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
19	The Co-curricular 4 field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
20	The Co-curricular 5 field will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.

Optional Functions	
Date Icon	Click this icon to display the date calendar tool.

Screen 8-11: Demographics Detail – Immunization Information (Edit/Add Option)

Instructions Table 8-16: Demographic Detail - Immunization Information (Edit Option)

	Step by Step Screen Instructions – Edit	Special Instructions
1	The Immunization Date 1 fields will be populated with the value for the record that was selected on the "Demographic History" page. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
2	The Immunization Date 2 fields will be populated with the value for the record that was selected on the "Demographic History" page. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
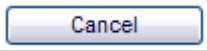
	Step by Step Screen Instructions – Edit	Special Instructions
3	The Immunization Date 3 fields will be populated with the value for the record that was selected on the "Demographic History" page. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
4	The Immunization Date 4 fields will be populated with the value for the record that was selected on the "Demographic History" page. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
5	The Other Immunization Type 1 and Type 2 fields will be populated with the value for the record that was selected on the "Demographic History" page. To change, update the text box.	This is an optional field.
6	The Other Immunization Date 1 and Date 2 fields will be populated with the value for the record that was selected on the "Demographic History" page. To change, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
7	Validate To validate the edited information to submit, select the Validate button.	The system will run all Input Validation Rules (IVR) against the inputted data. If the entered data does not pass the IVR, a "Validation Results" box will appear at the top of the screen with the specific errors listed, and the Cancel button must be selected to correct the data. If the entered data passes the IVR, select the Post button to post the record.

Optional Functions	
Date Icon	Click this icon to display the date calendar tool.
Cancel Cancel Button	Click this button to return to the "Student Information" page without saving any information entered.

Instructions Table 8-17: Demographic Detail - Immunization Information (Add Option)

	Step by Step Screen Instructions – Add	Special Instructions

	Step by Step Screen Instructions – Add	Special Instructions
1	The Immunization Date 1 fields will be *Blank.* To add, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
2	The Immunization Date 2 fields will be *Blank.* To add, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
3	The Immunization Date 3 fields will be *Blank.* To add, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
4	The Immunization Date 4 fields will be *Blank.* To add, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
5	The Other Immunization Type 1 and Type 2 fields will be *Blank.* To add, enter the data in the provided text box.	This is an optional field.
6	The Other Immunization Date 1 and Date 2 fields will be *Blank.* To add, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is an optional field.
7	Validate To validate the edited information to submit, select the Validate button.	The system will run all Input Validation Rules against the entered data. If this data does not pass the Input Validation Rules, a "Validation Results" box will appear at the top of the screen with the specific errors listed. To correct, the Cancel button must be selected. If the entered data passes the Input Validation Rules, select the Post button to post the record.

Optional Functions	
Date Icon	Click this icon to display the date calendar tool.
Cancel Button	Click this button to return to the "Student Information" page without saving any information entered.

8.1.7 Course History

The "Course History" page allows an authorized user to navigate to pages to make additions and updates. This page is accessed when a user selects the Course link on the "Student Information" page.

The selected student's key elements appear across the top of the page. A Filter Options box is displayed immediately below for the user to modify the student's list of historical records by School Year, Term, and Session Number for the records in the ODS. On the lower half of the page, the selected student's historical records are displayed.

Through this page, the authorized user may:

• View all of a student's course records.

• Update records by selecting an Edit link. The system will pre-populate existing information for the user to modify.

• Create a new record by selecting the Add Record button. The system will display a page with empty record fields for the user to populate.

• Delete the record by selecting the Delete link. The system will display the record for the user to review before deletion.

• Return to the "Student Information" page

Screen 8-12: Course History

Student Name	Local Student ID	State ID	Student Gender	School Name

Filter Options

1 School Year: `2014-2015` ▼ [Apply Filters]

2 Term: `Semester` ▼

3 Session Number: `First or Full Year` ▼

[Return to Student Information]

Course History
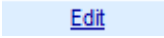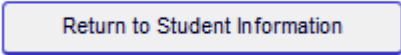
Displaying 1 - 5 of 5 Records | **Viewing page 1 of 1** | Select the # of records to view: ● Default(10) ○ 20 ○ All

School Year	School Name	Term	Session Number	Grade	State Course Code	State Course Name	Local Course Code	Local Course Name	Credits Earned	Course Grade	**4**	
2014-2015	Havre High School	Semester	First or Full Year	12	03052	Biology—Advanced Studies	234A	APP ENV SCIENCE	0.500		Edit	Delete
2014-2015	Havre High School	Semester	First or Full Year	12	08005	Fitness/Conditioning Activities	824A	PHYS CONDTN*	0.500		Edit	Delete
2014-2015	Havre High School	Semester	First or Full Year	12	01061	Literature of a Genre	933S	LIT OF HERO	0.500		Edit	Delete
2014-2015	Havre High School	Semester	First or Full Year	12	06102	Spanish II	431A	SPANISH II	0.500		Edit	Delete
2014-2015	Havre High School	Semester	First or Full Year	12	17006	Woodworking	723A	WOODWORKING	0.500		Edit	Delete

[Add Record]

Instructions Table 8-18: Course History

	Step by Step Screen Instructions	Special Instructions
1	Select an School Year to view the course records in a particular School Year and select Apply Filters	The filter will default to *All*
2	Select an Term to view the course records in a particular Term and select Apply Filters	The filter will default to *All*
3	Select an Session Number to view the course records in a particular Session Number and select Apply Filters	The filter will default to *All*
4	Review the record to determine if updates need to be made	If the user is authorized to update existing records or to delete a record, the system will display an Edit link and Delete link next to the record. A user may also click the Add Record button to add a new record

Optional Functions	
Edit Edit link	An Edit link will appear next to each existing record the user is authorized to modify. This link must be selected to modify the existing record.
Delete Delete link	A Delete link will appear next to each existing record the user is authorized to delete. This link must be selected to delete the existing record.
Add Record Add Record Button	The Add Record button may be selected to create a new record. The system will display a page with empty record fields for the user to populate
Return to Student Information Return to Student Information button	Click this button to return to the "Student Information" page

8.1.8 Course

The "Course" page allows an authorized user to add or update a student's course information. It is accessed through the following actions:

- Clicking the Edit link on the "Course History" page
- Clicking the Delete link on the "Course History" page
- Clicking the Add Record button on the "Course History" page

Screen 8-13: Course (Edit/Add Option)
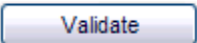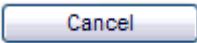
Instructions Table 8-19: Course (Edit Option)

	Step by Step Screen Instructions – Edit	Special Instructions
1	The School Year field will be populated with the value for the record that was selected on the "Course History" page. To change, select from the dropdown list.	This is a required field.
2	The Term field will be populated with the value for the record that was selected on the "Course History" page. To change, select from the dropdown list.	This is a required field.
3	The Session Number field will be populated with the value for the record that was selected on the "Course History" page. To change, select from the dropdown list.	This is a required field.
4	The School Name field will be populated with the value for the record that was selected on the "Course History" page. To change, update the text box.	This is a required field.
5	The Grade field will be populated with the value for the record that was selected on the "Course History" page. To change, select from the dropdown list.	This is a required field.

	Step by Step Screen Instructions – Edit	Special Instructions
6	The State Course Code field will be populated with the value for the record that was selected on the "Course History" page. To change, update the text box. If you update the course code the course name will also be updated.	This is a required field.
7	The State Course Name field will be populated for the record that was selected on the "Course History" page. To change, enter a new State Course Code and click on the lookup link.	This is a required field.
8	The Local Course Code field will be populated with the value for the record that was selected on the "Course History" page. To change, update the text box.	This field is required if State Course Code is 00000.
9	The Local Course Name field will be populated with the value for the record that was selected on the "Course History" page. To change, update the text box.	This field is required if State Course Code is 00000.
10	The Credit Earned field will be populated with the value for the record that was selected on the "Course History" page. To change, update the text box.	This is an optional field
11	The Course Grade field will be populated with the value for the record that was selected on the "Course History" page. To change, update the text box.	This is an optional field
12	[Validate] To validate the edited information to submit, select the Validate button.	The system will run all Input Validation Rules (IVR) against the data. If the entered data does not pass the IVR, a "Validation Results" box will appear at the top of the screen listing the specific errors. The Cancel button must be selected to correct the data. If the entered data passes the IVR, select the Post button to post the record.

Optional Functions	
[Cancel] Cancel Button	Click this button to return to the "Student Information" page without saving any information entered.

Instructions Table 8-20: Course (Add Option)

	Step by Step Screen Instructions – Add	Special Instructions

	Step by Step Screen Instructions – Add	Special Instructions
1	The School Year field will be *Blank.* To add, select from the dropdown list.	This is a required field.
2	The Term field will be populated will be *Blank.* To add, select from the dropdown list.	This is a required field.
3	The Session Number field will be *Blank.* To add, select from the dropdown list.	This is a required field.
4	The School Name field will be *Blank.* To add, select from the dropdown list.	This is a required field.
5	The Grade field will be *Blank.* To add, select from the dropdown list.	This is a required field.
6	The State Course Code field will be *Blank.* To add, enter a value in the text box provided.	This is a required field.
7	The State Course Name field will be *Blank.* To add, click on the lookup link next to the State Course Code.	This is a required field.
8	The Local Course Code field will be *Blank.* To add, enter a value in the text box provided.	This field is required if State Course Code is 00000.
9	The Local Course Name field will be *Blank.* To add, enter a value in the text box provided.	This field is required if State Course Code is 00000.
10	The Credit Earned field will be *Blank.* To add, enter a value in the text box provided.	This is an optional field.
11	The Course Grade field will be *Blank.* To add, enter a value in the text box provided.	This is an optional field.
12	Validate To validate the edited information to submit, select the Validate button.	The system will run all Input Validation Rules (IVR) against the typed data. If the entered data does not pass the IVR, a "Validation Results" box will appear at the top of the screen listing the specific errors. The Cancel button must be selected to correct the data. If the entered data passes the IVR, select the Post button to post the record.

Optional Functions	
Cancel Cancel Button	Click this button to return to the "Student Information" page without saving any information entered

Screen 8-14: Course (Delete Option)
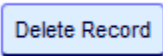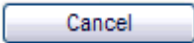
Instructions Table 8-21: Course Detail (Delete Option)

	Step by Step Screen Instructions	Special Instructions
1	Delete Record To delete record, select the Delete button.	To delete the record entirely, select the Delete Record button. The system will ask to confirm deletion. Depending on the user's selection, it will either cancel the process or remove the record from the ODS.

Optional Functions	
Cancel **Cancel** Button	Click this button to return to the "Student Information" page without saving any information entered.

8.1.9 Assessment History

The "Assessment History" page allows an authorized user to navigate to pages to make additions and updates. This page is accessed by selecting the Assessment link on the "Student Information" page.

The selected student's key elements appear across the top of the page. A Filter Options box is displayed immediately below the elements. The Filter Options box allows the user to modify the student's list of historical records by Test for the records in the ODS. On the lower half of the page, the selected student's historical records are displayed.

Through this page, the authorized user may:

• View all of a student's Assessment records.

• Update records by selecting an Edit link. The system will pre-populate existing information for the user to modify.

• Create a new record by selecting the Add Record button. The system will display a page with empty record fields for the user to populate.

• Delete the record by selecting the Delete link. The system will display the record for the user to review before deletion.

• Return to the "Student Information" page

Screen 8-15: Assessment History

Student Name	Local Student ID	State ID	Student Gender	Student Birth Date	School Name

Filter Options

1 Test: [▼]   [Apply Filters]

[Return to Student Information]
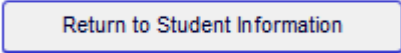
Assessment History

Displaying 1 - 10 of 12 Records | **Viewing page 1 of 2** | Select the # of records to view: ● Default(10) ○ 20 ○ All

2 1 2

Test	Subtest	Other Test Description	Test Date	Test Score	Score Method		
ACT	CompositeScore		4/1/2014		Scaled	Edit	Delete
ACT	CompositeScore		10/1/2014		Scaled	Edit	Delete
ACT	English		4/1/2014		Scaled	Edit	Delete
ACT	English		10/1/2014		Scaled	Edit	Delete
ACT	Math		4/1/2014		Scaled	Edit	Delete
ACT	Math		10/1/2014		Scaled	Edit	Delete
ACT	Reading		4/1/2014		Scaled	Edit	Delete
ACT	Reading		10/1/2014		Scaled	Edit	Delete
ACT	Science		4/1/2014		Scaled	Edit	Delete
ACT	Science		10/1/2014		Scaled	Edit	Delete

1 2

[Add Record]

Instructions Table 8-22: Assessment History

	Step by Step Screen Instructions	Special Instructions
1	Select Test to view the assessment records for a particular test and select Apply Filters.	The filter will default to *All.*
2	Review the record to determine if updates need to be made.	If the user is authorized to update existing records or to delete a record, the system will display an Edit link and Delete link next to the record. A user may also click the Add Record button to add a new record.

Optional Functions	
Edit Edit link	An Edit link will appear next to each existing record the user is authorized to modify. This link must be selected to modify the existing record.
Delete Delete link	A Delete link will appear next to each existing record the user is authorized to delete. This link may be selected to delete the existing record.
Add Record Add Record Button	The Add Record button must be selected to create a new record. The system will display a page with empty record fields for the user to populate.
Return to Student Information Return to Student Information button	Click this button to return to the "Student Information" page.

8.1.10 Assessment

The "Assessment" page allows an authorized user to add or update a student's assessment information. It is accessed through the following actions:

- Clicking the Edit link on the "Assessment History" page

- Clicking the Delete link on the "Assessment History" page

- Clicking the Add Record button on the "Assessment History" page

Screen 8-16: Assessment (Edit/Add Option)

Student Name	Local Student ID	State ID	Student Gender	Student Birth Date	School Name

Assessment

1. Test*: [dropdown]
2. Subtest*: [dropdown]
3. Other Test Description: [text box]
4. Test Date*: [text box] 📅 ✕
5. Test Score*: [text box]
6. Score Method*: [dropdown]

[Cancel] [Validate] 7

Instructions Table 8-23: Assessment (Edit Option)

	Step by Step Screen Instructions – Edit	Special Instructions
1	The Test field will be populated with the value that was selected on the "Assessment History" page. To change the value, select from the dropdown list.	This is a required field.
2	The Subtest field will be populated with the value that was selected on the "Assessment History" page. To change the value, select from the dropdown list.	This is a required field.
3	The Other Test Description field will be populated with the value that was selected on the "Assessment History" page. To change the value, update the text box.	This is an optional field.
4	The Test Date field will be populated with the value that was selected on the "Assessment History" page. To change the value, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is a required field.
5	The Test Score field will be populated with the value that was selected on the "Assessment History" page. To change the value, select from the dropdown list.	This is a required field.
6	The Score Method field will be populated with the value that was selected on the "Assessment History" page. To change the value, select from the dropdown list.	This is a required field.

	Step by Step Screen Instructions – Edit	Special Instructions
7	Validate To validate the edited information to submit, select the Validate button.	The system will run all Input Validation Rules (IVR) against the typed data. If the entered data does not pass the IVR, a "Validation Results" box will appear at the top of the screen listing the specific errors listed. The Cancel button must be selected to correct the data. If the entered data passes the IVR, select the Post button to post the record.

Optional Functions	
Cancel **Cancel** Button	Click this button to return to the "Student Information" page without saving any information entered.

Instructions Table 8-24: Assessment (Add Option)

	Step by Step Screen Instructions – Add	Special Instructions
1	The Test field will be *Blank.* To add, select from the dropdown list.	This is a required field.
2	The Subtest field will be *Blank.* To add, select from the dropdown list.	This is a required field.
3	The Other Test Description field will be *Blank.* To add, enter a value in the text box provided.	This is an optional field.
4	The Test Date field will be *Blank.* To add, enter a date in the MM/DD/YYYY format or select a date from the calendar tool.	This is a required field.
5	The Test Score field will be *Blank.* To add, enter a value in the text box provided.	This is an optional field.
6	The Score Method field will be *Blank.* To add, select from the dropdown list.	This is a required field.

	Step by Step Screen Instructions – Add	Special Instructions
7	To validate the edited information to submit, select the Validate button.	The system will run all Input Validation Rules (IVR) against the entered data. If this data does not pass the IVR, a "Validation Results" box will appear at the top of the screen listing the errors. The Cancel button must be selected to correct the data. If the entered data passes the IVR, select the Post button to post the record.

Optional Functions	
Cancel Button	Click this button to return to the "Student Information" page without saving any information entered.

Screen 8-17: Assessment (Delete Option)

Student Name	Local Student ID	State ID	Student Gender	Student Birth Date	School Name

1 Delete Record

Assessment

Test*:	ACT
Subtest*:	Composite
Other Test Description:	
Test Date*:	
Test Score*:	
Score Method*:	Scaled Score
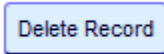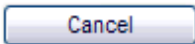
Cancel   Validate

Instructions Table 8-25: Assessment Detail (Delete Option)

Step by Step Screen Instructions	Special Instructions

	Step by Step Screen Instructions	Special Instructions
1	Delete Record To delete record, select the Delete button.	To delete the record entirely, select the **Delete Record** button. The system will confirm deletion. Depending on the selection, it will either cancel the process or remove the record from the ODS.

Optional Functions	
Cancel Cancel Button	Click this button to return to the "Student Information" page without saving any information entered.

8.2 Batch

The Batch menu provides an authorized user with the ability to submit batch files of any Record Type to the Data Transport System for processing. The user may select a single file or multiple files to upload at one time. Once the files are selected, the Data Transport System will check for errors associated with the specific file type format. Errors will then be listed for the user to examine as well as download. If no errors are found, the valid data will be displayed for users to review. The user may then submit all or part of the batch file for posting. The batch files will then be placed in a queue for processing and posting to the ODS.

8.2.1 Batch Menu

The Batch interface directs an authorized user to the appropriate pages to initiate the following actions:

• Upload File - A user may select the Upload File link to view the "Upload File" page where the user may select a batch file(s) to submit for processing

• View Submission Status - A user may select the View Submissions Status link to view the "Submission Status" page where an authorized user may manage previously submitted files

When a user clicks the Batch link from the Submit Transcript Menu, the system displays the Batch Landing page.
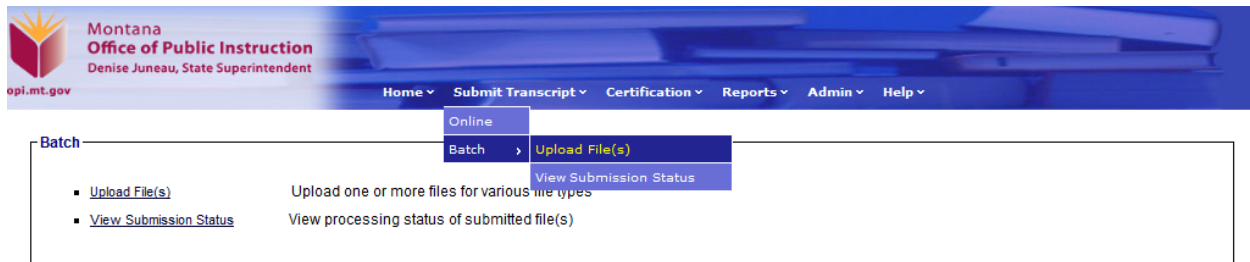
8.2.1 Upload File(s)

The "Upload File(s)" page allows an authorized user to select one or more batch file(s) to submit to the Data Transport System. This page displays when the user selects the Upload File link from the Batch menu.

The following restrictions apply to the upload:
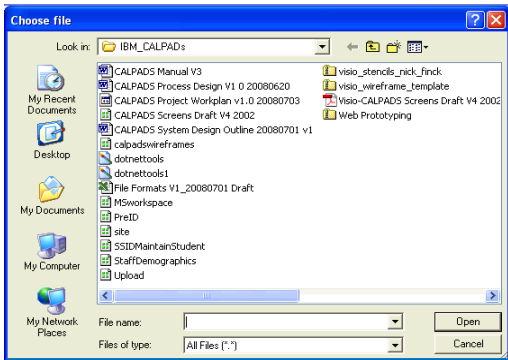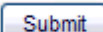
• The user is required to select a valid, uniquely named file using the Browse button

• The system displays appropriate validation errors to the user if a duplicate Job Name and/or File Name are provided in the same upload session

• The system displays appropriate validation errors to the user if the length of any word in the file name is greater than twenty characters

• The system displays appropriate validation errors if the file name does not contain at least one space
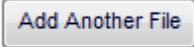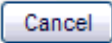
Screen 8-19: Upload File(s)

Instructions Table 8-26: Upload File(s)

Step by Step Screen Instructions	Special Instructions

Step by Step Screen Instructions	Special Instructions
1	Select the File Type of the file.	
2	In the first Upload Row, enter a valid, unique name in the Job Name text box to provide a *customized* name to the processing task.	
3	Click on the Browse button ⬚Browse⬚ in the selected upload row and select a valid file to upload in the File Upload dialog box. [Choose file dialog box screenshot showing IBM_CALPADs folder contents]	The valid batch file extensions include: .CSV, TSV, .TXT, and .XLS.
4	Click on the Submit button ⬚Submit⬚ to initiate the upload process for the file(s).	Do not navigate away from the page until the file is finished uploading. A confirmation message will be displayed once the file has been successfully uploaded.

Optional Functions	
Add Another File Button	To upload more than one file at a time, click this button and choose another file.
delete row Delete Row Button (Firefox) delete row Delete Row Button (Internet Explorer)	To remove a selected file from the interface, click this button or link.
Cancel Button	To cancel the process and remove the selected files, click this button.

8.2.3 Upload File Results

The "Upload File Results" page allows an authorized user to view the results of the file upload for all the files submitted through the "Upload File" page. The system will display the assigned Job ID and the File Status for each of the user's submitted files. This page displays when the uploaded file(s) have completed the defined validations.

A user may perform the following functions:

- View a file's upload status
- Make a selection to view a file's submission status

Screen 8-20: Upload File Results

Instructions Table 8-27: Upload File Results

Step by Step Screen Instructions		Special Instructions
1.	View each File Type to make sure the selected file types are correct	
2.	View each file's Job Name to make sure all files intended to be uploaded are listed.	The Job Name was assigned to each file from the previous screen by the user.
3.	View each file's File Name to make sure all files intended to be uploaded are listed.	The File Name is the name of the file from the user's computer.
4.	View and note the Job IDs assigned to each file	These IDs are automatically assigned in order to keep track of each file.
5.	View the Status of each file	The Status indicates the state in which the file is in. (Details of each status is available through the instructions for the "Submission Status" page).
6.	Select the View Submission Status button	The "Submission Status" page will display with the ability for the user to view the uploaded files and perform Submissions Status functions.

8.2.4 Submission Status

The "Submission Status" page provides an authorized user with a complete list of all the submitted batch files. It also updates the status of each file as it changes due to the system processing the file or as a result of the authorized user interacting with the file. This page displays when the user clicks the View Submission Status button on the "File Upload Results" page.

The "Submission Status" interface has the following functionality:

- View the status and details of submitted batch files

- Filter the results on the page to view specific files

- Modify the sort order of the files on the page

- Determine the reason a file failed to upload

- An authorized user may Archive files in a Complete state

- An authorized user may Remove a file in either an Upload Failed or an In Queue status to exclude it from the submission and posting processes

- Return to the "File Upload" page

A file may be in one of the following possible states after the upload process or during the batch submission process:

- Upload Failed – a file did not pass the initial upload validations or rules processing

- In Queue – a file passed the initial upload validations and rules processing and is waiting to be processed (Queue: the process waiting line for files)

- Cancelled - the entire file has been cancelled from posting because of intervention for technical reasons or a file that has not been posted has been cancelled by the user

- In Process – a file is currently being processed by the system. Each record in the file is being processed by the Input Validation Rules.

- Processing - a file is being processed through the Input Validation Rules.

- Ready for Review – a file has completed the initial submission processing and is ready for an authorized user to review the results

- In Review – a file has completed the initial submission processing and an authorized user has reviewed the results, but has not made a selection of one or more sets of records in the file requiring user interaction

- Posting – a file is being posted to the Operational Data Store (ODS)

- Partial Post – a file with multiple schools that has one or more school(s) posted but not all school(s) are posted.

- Post Failed - at least one school in the file contains records that has resulted in errors during posting.

- Excluded - an entire file of submitted records was removed from the submission process and not posted to the ODS

- Complete - an entire file of "passed" submitted records has been posted to the ODS or all records in the file have failed the Input Validation Rule processing

Screen 8-21: Submission Status

Instructions Table 8-28: View Submission Status

Step by Step Screen Instructions		Special Instructions
1.	Use the Filter Options to refine the list of files displayed at the bottom half of the page. To refine the list by File Type, File Status, Submitter Name, File List, or District, change one or more of the filter values using the drop down lists.	A value must be displayed in each filter option if the user wishes to use filters.
2.	Use the Filter Options to refine the list of files displayed at the bottom half of the page. To refine the list by Submitted Date or Status Date, select the appropriate radio button and enter Date Range – Start Date and/or Date Range – End Date in the MM/DD/YYYY format or select a date using the calendar tool.	Either the Submitted Date or Status Date must be selected if the user wishes to use filters. The Date Range – Start Date and Date Range – End Date are optional.
3.	Select the Apply Filters button once the filter options values are chosen.	
4.	View the File Status of each submitted file in the results list at the bottom half of the page.	
5.	For those files that have finished processing, results for each file will display. The number of Total Records, Passed records, and Rejected records is displayed to the right of each file.	

Step by Step Screen Instructions		Special Instructions
6.	For those files that have finished processing, the Job Name will appear as a link. To view details of a file, click on the file's Job Name.	The "File Details" page will display the contents of the file by School Name.

Optional Functions	
Reset Filters (Reset Filters Button)	To restore all filter options fields to their default value, select the Reset Filters button.
Upload Another File (Upload Another File Button)	To upload another file, click on the Upload Another File button. If selected, the "File Upload" page will display.
Remove (Remove Button)	The system will only display the Remove button to authorized users and next to files in either an Upload Failed or an In Queue state; if selected, the corresponding file will be removed from the submission and posting processes.
Archive (Archive Button)	The system will only display the Archive button to authorized users and next to files in a Complete or Excluded state; if selected, the corresponding file will be archived.
Student Name Local Student ID	Click on any column heading links to sort the results. The first click on the field name orders records in the ascending order, the second click orders information in descending order.
⦿ Default(10) ◯ 20 ◯ All	The system will default to show up to ten results per page. To see more, select either the twenty or ALL radio button.

8.2.5 File Details

The "File Details" page provides an authorized user with the details of a submitted file. This page is accessed when the user clicks the Job Name link of a particular file on the "Submission Status" page.

The selected file's key elements display at the top of the page and the submission summary for the entire batch file with a total count of all the schools in the file and a breakdown of the aggregate count by School Status displays next. Also displayed on the page are the status and record results for all the schools in the file as well as for each school in the file. The Record

Results section on the page displays an aggregate breakdown of the total records, passed records, and rejected records for all schools and each school within the file. The schools displayed can also be filtered by School Status.

An authorized user may perform the following functions on this interface:

- View the status and details for each school in a selected file
- Filter the school results displayed on the page
- Modify the sort order of the schools on the page
- View the details of Passed records for one or all the schools in a selected file
- View the details of Rejected records for one or all the schools in a selected file
- Return to the "Submission Status" page to view the selected file results

Screen 8-22: File Details

Instructions Table 8-29: View File Details

Step by Step Screen Instructions		Special Instructions
1.	View the key elements of the selected file. Fields shown include: Job ID, Job Name, File Name, File Type, Submitter, Submitted Date/Time, File Status, Status Date/Time.	
2.	View the summary of the number of schools included in the file and summary of the number of schools with each type of School Status.	
3.	Select to filter the displayed schools by School Status by selecting from the drop down list. Then click the Apply Filters button.	

Step by Step Screen Instructions		Special Instructions
4.	View the School, Status, Modified Date/Time, and Modifier columns for each set of school records. The records for all of the schools in the file are displayed first with records for each school displayed below.	
5.	View the Record Results of each set of school records. The number of Total Records, Passed records, and Rejected records are shown for each school and all schools combined.	
6.	Click on the Passed records count link to view the details of the passed records in the corresponding submitted file.	The "Passed Records" page will display based on the file type. If the number is zero, the number will be read-only and the link will not be available.
7.	Click on the Rejected records count link to view the details of the rejected records in the corresponding submitted file.	The "Rejected Records" page will display based on the file type. If the number is zero, the number will be read-only and the link will not be available.

Optional Functions	
Reset Filters Button	To restore the filter option field to the default value, select the Reset Filters button.
Return to Submission Status Button	To return to the "Submission Status" page, select the Return to Submission Status button.
	Click on column heading links to sort the results. The first click orders records in the ascending order. The second click orders information in descending order.
	The system will default to show up to ten results per page. To see more, select either the twenty or ALL radio button.

8.2.6 Passed Records Summaries (Demographics, Course, Assessment)

The "Passed Record Summary" page enables an authorized user to either post data to the ODS or to exclude data for one school or for all schools in the selected file. This page displays when the user clicks a Passed records count link on the "File Details" page.

The "Submission Summary" page displays information about the selected file across the top and other attributes of the selected file type. A "Submission Summary" page for each file type is available. This page displays the summary counts of each Key Element of the appropriate file.

The Key Element box contains the Element Name (depending on the File Type) in a collapsible/expandable section. When the section is expanded, the system will display the specified Data Transport Value Name(s) for the element with the count of records containing that specified value. If the count is not zero, each element's value count is a show button where if clicked, the individual records containing the selected element will be shown in a table below the Key Element box. If a mandatory element is missing in a record, it will display as a rejected record. If the element is optional, the count of records that did not have the element populated will also be displayed. The first element of each list will be the Warning Messages to alert the user to warning errors identified by the system during the validation and/or rules processes. The second key element is an All Records selection which allows the user to view the details of all the records regardless of the Key Element values.

A user may perform the following functions through this interface:

- Reduce the number of results by using the School filter

- View a summary of the values submitted in a file for key elements or warning messages

- View the details of individual records containing either a specific element value or a blank value

- Select to Post the displayed school or all schools to the ODS

- Select to Exclude the displayed school or all schools from the posting process

- Manipulate the display of records on the page

- Return to the "File Details" page

Screen 8-23: Passed Records Summary (Demographics)

Job ID	Job Name	File Name	File Type	Submitter	Submitted Date/Time	File Status	Status Date/Time
2758	Test File.csv	1027.csv	Demographic Record	JMcquirt	2/13/2015 1:47:08 AM	In Review	2/13/2015 2:10:06 AM

1

Filter Options

School Status: All ▼ [Apply Filters] **2**

Record Results

Total Records	11
Passed	10
Rejected	1
Submission Status	In Review

3

10

[Post] [Exclude]   [Return to File Detail]

Warnings	Total Passed Records	Total Warnings
Warning Messages	10	4

4   **5**

Key Element	Total By Key Element
All Records	10
Student Gender	10
GraduationYear	10

6   **7**

2015	3	[Show]
2016	3	[Show]
2017	2	[Show]
2018	2	[Show]

8   **9**

[Post]   [Exclude]   [Return to File Detail]

Filter Options for Student Details

StateID: [_____]
Local Student ID: [_____]   **11**   [Apply Filters]

[Reset Filters] **13**   **14**

Displaying 1 - 2 of 2 Records | Viewing page 1 of 1 | Select the # of records to view: ● Default (10) ○ 20 ○ All

StateID	Local Student ID	Student Name	Gender	Birth Date	School	
					Havre High School	[View Details]
					Havre High School	[View Details]

12

Displaying 1 -2 of 2 Records | **Viewing page 1 of 1** | Select the # of records to view: ● Default(10) ○ 20 ○ All

Screen 8-24: Passed Records Summary (Course)

Job ID	Job Name	File Name		File Type	Submitter	Submitted Date/Time	File Status	Status Date/Time
2643	2754.csv	2754.csv	**1**	Course Record	JMcquirt	2/3/2015 3:25:28 PM	In Review	2/3/2015 3:30:23 PM

Filter Options

School Status: [All ▼] [Apply Filters] **2**

Record Results

Total Records	25	
Passed	23	
Rejected	2	**3**
Submission Status	In Review	

10

[Post] [Exclude] [Return to File Detail]

Warnings	**4**	Total Passed Records	Total Warnings	**5**
▶ Warning Messages		23	0	

Key Elements	**6**	Total By Key Element	**7**
▶ All Records		23	
▼ AcademicYear		23	

2012-2013		5	[Show]
2013-2014	**8**	12	[Show] **9**
2014-2015		6	[Show]

▶ Term	23
▶ Session Number	23

[Post] [Exclude] [Return to File Detail]

Filter Options for Student Details

State ID: [_____]

State Course Code: [_____] **11**   [Apply Filters] ← **13**

Local Course Code: [_____]   [Reset Filters]

14

Displaying 1 - 6 of 6 Records | Viewing page 1 of 1 | Select the # of records to view: ● Default(10) ○ 20 ○ All

State ID	Grade	State Course Code	State Course Name	Local Course Code	Local Course Name	School Name	
	12		English Morphology and Grammar	942S	ADV GRAMMAR	Havre High School	[View Details]
	12		Biology—Advanced Studies	234A	APP ENV SCIENCE	Havre High School	[View Details]
	12	**12**	U.S. Government—Comprehensive	332S	U.S. GOV'T	Havre High School	[View Details]
	12		Photography	622S	PHOTOGRAPHY	Havre High School	[View Details]
	12		Business Law	531S	BUSINESS LAW	Havre High School	[View Details]
	12		Family and Consumer Science—Comprehensive	732S	FOODS/HOUSE	Havre High School	[View Details]

Displaying 1 -6 of 6 Records | **Viewing page 1 of 1** | Select the # of records to view: ● Default(10) ○ 20 ○ All

Screen 8-25: Passed Records Summary (Assessment)

Instructions Table 8-30: Submission Summary (Demographics, Course, and Assessment)

Step by Step Screen Instructions		Special Instructions
1	View the values of the selected file from the "Submission Status" page. Values displayed are Job ID, Job Name, File Name, File Type, Submitter, Submitted Date/Time, File Status, and Status Date/Time.	
2	To filter the results by a particular school or all schools, select from the dropdown list. Then select Apply Filters to only display results that match the chosen value.	A value must be chosen before the Apply Filters button is selected.

Step by Step Screen Instructions		Special Instructions
3	View the Record Results box where the Total Records, Passed record and Rejected record counts are displayed.	
4	The Warning Messages is the first Key Element displayed. To view each count of records for each type of warning message, click on the ▶ expand/collapse button to view the list of Warning Messages and counts of each message.	
5	If the count of records containing warning messages is not zero, click the Show button to view a list of the records that contain the warning messages. This list appears at the bottom of the screen.	
6	The All Records count is the second Key Element category displayed. This notifies the user of the total number of passed records regardless of the Key Element values. Click on the ▶ expand/collapse button to view the count of ALL Records.	
7	If the count of All Records is not zero, click on the Show button to display a list of the submitted records.	A list of the records will display at the bottom of the screen.
8	The following Key Elements will be specific elements related to the File Type being viewed. To view the count of records containing a particular value for a Key Element, click on the ▶ expand/collapse button to view the counts.	If the particular Key Element's box is expanded, the element's populated values will display with the count of records containing the value and a Show button.
9	If the value count is not zero, click on the Show button to view a list of the records that contain the particular value.	
10	After viewing the details of the records for the school(s), select the Post button to post the records to the ODS or select the Exclude button to exclude records from posting.	If Post is selected, the system will display a confirmation message and will then post the displayed school or schools to the ODS. If Exclude is selected, the system will display a confirmation message and will exclude the records from posting to the ODS.
11	Enter or select a value in any of the filtering options to focus the list of records at the bottom of the screen based on your criteria. Each record type has different criteria available to choose from. Click the Apply filters button to regenerate the list of records at the bottom of the screen.	
12	View the list of records based on the Show button selected above and the specified filtering criteria. Each record type will have its own set of fields that are viewed, primarily to help identify specific records.	

Step by Step Screen Instructions		Special Instructions
13	Click the Apply Filters button to regenerate the list of records at the bottom of the screen. Click the Reset Filters button to clear the filtering options.	
14	Click the View Details button to display all fields in the record selected.	The system will display the record on the Submission Details screen.

Optional Functions	
Return to File Details **Return to File Details** Button	To return to the "File Details" page, select the Return to File Details button.

8.2.7 Passed Records – Submission Details

Once the user has navigated to the particular job and selected the Passed Record Count link on the "File Details" page, the "Submission Summary" page displays. By clicking the expand arrow to the left of the Key Element name and then on the Key Element Show button on the right side, the "Submission Details" page of passed records provides an authorized user with a table of Key Elements for that file type.

The user may use the Next Record and Previous Record buttons to page through and view all records in the file. The user may view all records with a particular Key Element value or all records in the file. Once the user has verified that the details of the records are correct, the user may then use the Return to List button to return to the "Submission Summary" page in order to post/exclude one or all schools in the file.

Screen 8-26: Passed Records – Submission Details (Demographics) (Part 1)

Job ID	Job Name	File Name	File Type	Submitter	Submitted Date/Time	File Status	Status Date/Time
2758	Test File.csv	1027.csv	Demographic Record	JMcquirt	2/13/2015 1:47:08 AM	In Review	2/13/2015 2:10:06 AM

Filtered Criteria

School: All Schools

Key Element Name: F

Key Element Value: Student Gender

3 Return to List | **2** << Previous Record | Next Record >> | (1 of 5)

1

Record Type Code	TR-DEM
School System Name	Havre District 16 and A
School Name	Havre High School
School Code	1450
School Address Line1	900 18th ST.
School Address Line2	
School City	Havre
School State	MT
School Zipcode	59501
School Phone	4062656731
Student FirstName	
Student LastName	
Student MiddleName	
Suffix	
StateID	
Local Student ID	
Parent/Guardian FirstName	
Parent/Guardian LastName	
Student Home Address Line 1	

Student Home Address Line 2	
Student City	
Student State	
Student Zipcode	
Student Phone	
Student Birthdate	
Student Gender	
Graduation Date	
Graduation Year	
Enrollment StartDate	
ExitDate	
GPA Type	
GPA	
Class Rank	
Class Size	
Diploma Type	
Academic Honors1	
Academic Honors2	
Academic Honors3	
Academic Honors4	
Academic Honors5	
Required No of Credits for Graduation	
Polio Immunization Date1	
Polio Immunization Date2	
Polio Immunization Date3	
Polio Immunization Date4	
DTP/DtaP/DT/T d Immunization Date1	
DTP/DtaP/DT/T d Immunization Date2	
DTP/DtaP/DT/T d Immunization Date3	
DTP/DtaP/DT/T d Immunization Date4	
MMR Immunization Date1	
MMR Immunization Date2	
MMR Immunization Date3	
MMR Immunization Date4	
HIB Meningitis Immunization Date1	
HIB Meningitis Immunization Date2	
HIB Meningitis Immunization Date3	
HIB Meningitis Immunization Date4	
Meningococcal Immunization Date1	
Meningococcal Immunization Date2	
Meningococcal Immunization Date3	
Meningococcal Immunization Date4	

Screen 8-28: Passed Records – Submission Details (Demographics) (Part 3)

Hep A Immunization Date1	
Hep A Immunization Date2	
Hep A Immunization Date3	
Hep A Immunization Date4	
HBV Immunization Date1	
HBV Immunization Date2	
HBV Immunization Date3	
HBV Immunization Date4	
Varicella (Chicken Pox) Immunization Date1	
Varicella (Chicken Pox) Immunization Date2	
Varicella (Chicken Pox) Immunization Date3	
Varicella (Chicken Pox) Immunization Date4	
TB Immunization Date1	
TB Immunization Date2	
TB Immunization Date3	
TB Immunization Date4	
RSV Immunization Date1	
RSV Immunization Date2	
RSV Immunization Date3	
RSV Immunization Date4	
PCV Immunization Date1	
PCV Immunization Date2	
PCV Immunization Date3	
PCV Immunization Date4	
PPV Immunization Date1	
PPV Immunization Date2	
PPV Immunization Date3	
PPV Immunization Date4	
INF Immunization Date1	
INF Immunization Date1	
INF Immunization Date2	
INF Immunization Date3	
INF Immunization Date4	
HPV Immunization Date1	
HPV Immunization Date2	
HPV Immunization Date3	
HPV Immunization Date4	
Other Immunization Type 1	
Other Immunization Date 1	
Other Immunization Type 2	
Other Immunization Date 2	
Co-Curricular 1	
Co-Curricular 2	
Co-Curricular 3	
Co-Curricular 4	
Co-Curricular 5	

Screen 8-29: Passed Records – Submission Details (Course)

Job ID	Job Name	File Name	File Type	Submitter	Submitted Date/Time	File Status	Status Date/Time
2643	2754.csv	2754.csv	Course Record	JMcquirt	2/3/2015 3:25:28 PM	In Review	2/3/2015 3:30:23 PM

Filtered Criteria

School: All Schools

Key Element Name: 2012-2013

Key Element Value: AcademicYear

3 | Return to List | **<< Previous Record** | **Next Record >>** | (1 of 5) | ← **2**

1

Record Type Code	TR-CRS
State ID	
Grade	
SchoolYear	
School Name	
State Course Code	
Local Course Code	
State Course Name	
Local CourseName	
Credits Earned	
Course Grade	
Term	
Session Number	

| Return to List | << Previous Record | Next Record >> | (1 of 5) |

Screen 8-30: Passed Records – Submission Details (Assessment)

Job ID	Job Name	File Name	File Type	Submitter	Submitted Date/Time	File Status	Status Date/Time
2590	Test 8 Assessment.csv	Test 8 Assessment.csv	Assessment Record	OUser1	1/29/2015 1:00:27 PM	In Review	1/29/2015 1:06:38 PM

Filtered Criteria

School: All Schools

Key Element Name: ACT

Key Element Value: Test

3 | Return to List | **<< Previous Record** | **Next Record >>** | (1 of 7) | ← **2**

1

Record Type Code	TR-AST
State ID	
Test	
SubTest	
Other Test Description	
Test Date	
Test Score	
Score Method	

| Return to List | << Previous Record | Next Record >> | (1 of 7) |

Instructions Table 8-31: Passed Records – Submission Details

Step by Step Screen Instructions		Special Instructions
1	Verify the values of each field in the displayed record.	
2	Use the Next Record or Previous Record buttons to navigate to the details of another record in the selected set of records. Then verify the values of each field of the next record.	
3	Once all records have been reviewed, use the Return to List button to navigate back to the "Submission Summary" page in order to Post or Exclude the selected school or all schools in the file.	

8.2.8 Rejected Records Summary

The "Rejected Records" page provides an authorized user with the details of records in a submitted file that have failed the defined validations and rules processing and therefore cannot be posted. This page is accessed when the user selects a Rejected Records Count link from the "File Details" page.

The file's attributes are displayed across the top of the page. Below the job information, the system displays a Filter Options box.

A user may perform the following functions through this interface:

- View the status and details of rejected records for an individual school or all the schools in a submitted batch file

- View the status and details for rejected records by a specified match status

- Select the details of rejected records by the Error Category or by the Error Description

- Modify the sort order of the records displayed on the page

- Return to the "File Details" page

Screen 8-31: Submission Status – Rejected Records Summary

Instructions Table 8-32: Rejected Records Summary

	Step by Step Screen Instructions	Special Instructions
1.	View the details of the selected file from the "Submission Status" page for reference. Values displayed are Job ID, Job Name, File Name, File Type, Submitter, and Submitted Date/Time.	
2.	To filter the list of records containing errors by School, select an individual school or all schools from the drop down list.	A value must be chosen before the Apply Filters button is selected.
3.	To filter the list of records containing errors by Error Severity, select an individual error severity or all error severities from the drop down list.	A value must be chosen before the Apply Filters button is selected.
4.	To view a record for an individual student using a known State ID, enter the State ID in the text box provided.	
5.	To view a record for an individual student using a known Local Student ID, enter the ID in the text box provided.	

Step by Step Screen Instructions		Special Instructions
6.	Select the Apply Filters button once all desired filter criteria is selected or entered.	If the Apply Filters button is clicked, this selection will direct the system to only display records that match the chosen value.
7.	The Error categories display in the State ID Record Results box. To view the counts of records for each type of error message, click on the ⊙ expand/collapse button to view the individual fatal error counts.	If the Error category is expanded, each error associated with the file will be listed with the count of records containing a particular error.
8.	View each error message displayed and the counts of records containing each error	
9.	Click on the Show button to the right of each error count to view the records and details of the records that make up that error count.	The individual records containing the selected error will display at the bottom of the page.
10.	View all records with the selected error to determine the corrections necessary for these records to pass the validations.	To post these records to the ODS, corrections need to take place in the source file, which can then be resubmitted for processing.
11.	Select the View Details button to view the entered values for the particular record.	The system will display the record layout on another screen, which will include the School, Error Severity, Error Code, Error Description, Field Name that is in error, and Field Value based on Field Name.

Optional Functions	
Reset Filters Reset Filters Button	To reset the filters to their original value, select the Reset Filters button.
Return to File Detail Return to File Detail Button	If selected, the system will return to the, "File Details" page.
⦿ Default(10) ◯ 20 ◯ All	The system will default to show up to ten results per page. To see more, select either the twenty or ALL radio button.
Student Name▼ **State ID** **Local Student ID**	To sort the columns, select the column headings. First selection orders records by the ascending values; second selection reorders records by the descending values.

8.2.9 Rejected Records – Submission Details

The "Rejected Records – Submission Details" page provides an authorized user with the details of each individual failed record in the submitted file. The page is accessed when the user selects a View Details button from the "Rejected Records" page.

The user may use the Next Record and Previous Record buttons to page through and view all rejected records in the file. The user may view all records containing a specific error or all rejected records in the file. Once the user has determined the wrong value for each record, the user must correct the records in the original source file before resubmiting the file for processing.

Screen 8-32: Rejected Records – Submission Details (Demographics) (Part 1)

Screen 8-33: Rejected Records – Submission Details (Demographics) (Part 2)

Student Home Address Line 2	
Student City	
Student State	
Student Zipcode	
Student Phone	
Student Birthdate	
Student Gender	
Graduation Date	
Graduation Year	
Enrollment StartDate	
ExitDate	
GPA Type	
GPA	
Class Rank	
Class Size	
Diploma Type	
Academic Honors1	
Academic Honors2	
Academic Honors3	
Academic Honors4	
Academic Honors5	
Required No of Credits for Graduation	
Polio Immunization Date1	
Polio Immunization Date2	
Polio Immunization Date3	
Polio Immunization Date4	
DTP/DtaP/DT/T d Immunization Date1	
DTP/DtaP/DT/T d Immunization Date2	
DTP/DtaP/DT/T d Immunization Date3	
DTP/DtaP/DT/T d Immunization Date4	
MMR Immunization Date1	
MMR Immunization Date2	
MMR Immunization Date3	
MMR Immunization Date4	
HIB Meningitis Immunization Date1	
HIB Meningitis Immunization Date2	
HIB Meningitis Immunization Date3	
HIB Meningitis Immunization Date4	
Meningococcal Immunization Date1	
Meningococcal Immunization Date2	
Meningococcal Immunization Date3	
Meningococcal Immunization Date4	

Screen 8-34: Rejected Records – Submission Details (Demographics) (Part 3)

Field	Value
Hep A Immunization Date1	
Hep A Immunization Date2	
Hep A Immunization Date3	
Hep A Immunization Date4	
HBV Immunization Date1	
HBV Immunization Date2	
HBV Immunization Date3	
HBV Immunization Date4	
Varicella (Chicken Pox) Immunization Date1	
Varicella (Chicken Pox) Immunization Date2	
Varicella (Chicken Pox) Immunization Date3	
Varicella (Chicken Pox) Immunization Date4	
TB Immunization Date1	
TB Immunization Date2	
TB Immunization Date3	
TB Immunization Date4	
RSV Immunization Date1	
RSV Immunization Date2	
RSV Immunization Date3	
RSV Immunization Date4	
PCV Immunization Date1	
PCV Immunization Date2	
PCV Immunization Date3	
PCV Immunization Date4	
PPV Immunization Date1	
PPV Immunization Date2	
PPV Immunization Date3	
PPV Immunization Date4	
INF Immunization Date1	
INF Immunization Date1	
INF Immunization Date2	
INF Immunization Date3	
INF Immunization Date4	
HPV Immunization Date1	
HPV Immunization Date2	
HPV Immunization Date3	
HPV Immunization Date4	
Other Immunization Type 1	
Other Immunization Date 1	
Other Immunization Type 2	
Other Immunization Date 2	
Co-Curricular 1	
Co-Curricular 2	
Co-Curricular 3	
Co-Curricular 4	
Co-Curricular 5	

Screen 8-35: Rejected Records – Submission Details (Course)

1

Job ID	Job Name	File Name	File Type	Submitter	Submitted Date/Time	File Status	Status Date/Time
2643	2754.csv	2754.csv	Course Record	JMcquirt	2/3/2015 3:25:28 PM	In Review	2/3/2015 3:30:23 PM

Filtered Criteria

School:	All Schools	**2**
Error Severity :	Fatal Error	**3**
Error Code:	FRMT002	**4**
Error Description:	Invalid Characters in Field	**5**
Field Name:	Credits Earned	**6**
Field Value:	0.5x	**7**

[Return to List] [<< Previous Record] [Next Record >>] (1 of 2) **9**

		8
Record Type Code	TR-CRS	
StateID		
Grade		
School Year		
School Name	.	
State Course Code		
Local Course Code		
State Course Name		
Local Course Name	.	
Credits Earned		
Course Grade		
Term		
Session Number	.	

[Return to List] [<< Previous Record] [Next Record >>] (1 of 2)

Screen 8-36: Rejected Records – Submission Details (Assessment)

1

Job ID	Job Name	File Name	File Type	Submitter	Submitted Date/Time	File Status	Status Date/Time
2399	Test 7 Assessment v2.csv	Test 7 Assessment v2.csv	Assessment Record	JMcquirt	1/9/2015 9:58:01 AM	Complete	1/9/2015 9:59:02 AM

Filtered Criteria

School:	All Schools	**2**
Error Severity :	Fatal Error	**3**
Error Code:	TRAST005	**4**
Error Description:	Missing Demographic Record	**5**
Field Name:	Student ID	**6**
Field Value:		**7**

[Return to List] [<< Previous Record] [Next Record >>] (1 of 10) **9**

		8
Record Type Code	TR-AST	
State ID	.	
Test Name		
SubTest	.	
Other Test Description	.	
Test Date	.	
Test Score		
Score Method	.	

[Return to List] [<< Previous Record] [Next Record >>] (1 of 10)

Instructions Table 8-33: View Rejected Records – Submission Details

Step by Step Screen Instructions		Special Instructions
1	View the details of the selected file from the "Submission Status" page for reference. Values displayed are Job ID, Job Name, File Name, File Type, Submitter, and Submitted Date/Time.	
2	School value displayed is based on the detail record being reviewed.	The system displays the school value based on the view details of the record that were selected from the "Submission Status" page.
3	Error Severity value displayed is based on the detail record being reviewed.	The system displays the error severity based on the view details of the record that was chosen from the "Submission Status" page.
4	Error Code value displayed is based on the detail record being reviewed.	The system displays the error code value based on the view details of the record that was chosen from the "Submission Status" page.
5	Error Description displayed is based on the detail record being reviewed.	The system displays the error description based on the view details of the record that was chosen from the "Submission Status" page.
6	Field Name displayed is based on the field name in error for the record being reviewed.	
7	Field Value displayed is based on the field value in error for the record being reviewed.	
8	View the values of each field in the displayed record to determine the correction(s) necessary.	The system displays the record layout based on the view details of the record that was selected from the "Submission Status" page.
9	Use the Next Record or Previous Record and Return to List buttons to navigate to the details of another record in the selected set of records.	

9. Certification

The Certification interface allows an authorized user to view and manage the district and schools certification. The user will use the Certification pages to view school data created through various reports, view the certification status, certify after verifying data through viewing the appropriate reports, and view a list of certification errors/warnings.

9.1 Certification Menu

The "Certification" menu provides an authorized user access to a menu page with a sub-menu for the various certifications. This page is accessed when the user selects Certification menu.

Through this interface, the user can access interfaces to manage the district's certifications for the following:

• Certify Transcript

9.2 Certify Transcript

The "Certification" page provides an authorized user access to a menu page with a sub-menu Certify Transcript link to the "Certification Status" page where the user can manage the school's certifications. This page is accessed when the user selects Certify Transcript from the Certification menu. A user may only certify a school with an ACT/CEEB code.

9.2.1 Certification Status

The "Certification Status" page provides an authorized user with the current certification status for the schools within the district. This page is accessed when an authorized user selected the Certify Transcript link on the "Certifications" menu page.

From this interface the user will be able to:

• View a list of schools, their certification status and other attributes

• Select the School name link to view the certification details

• View the Total count of errors

Filter Options can be used to refine the list of schools displayed. The user may select from the following Filter Options:

• District

• School

• Certification Status – the following statuses are used:

   o Certified – all data for the school is certified
   o Partially Certified – some of the data for the school is certified
   o Ready for Certification – none of the data for the school is certified

Screen 9-1: Certification Status
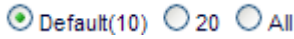
Instructions Table 9-1: Certification Status

	Step by Step Screen Instructions	Special Instructions
1	The District dropdown defaults to the user's district. If the user has access to multiple districts, use the District dropdown to select a different district to view.	
2	The School dropdown defaults to "All." If the user has access to multiple schools, use the School dropdown to select a different school to view.	
3	The Certification Status field defaults to "All." The user may select a different value from the drop down list.	
4	Click on the Apply Filters button to produce the list based on the specified filter criteria.	The system will filter the results based on the selected criteria options and will display the identified files in the results list on the page.
5	View the Certification Status of each school to determine the actions necessary to complete the certification process.	Definitions of the Certification Statuses are listed above.
6	View the Error counts for each school.	
7	Click on the School Name link to view additional information and take appropriate action to certify the school.	When the School Name link is selected, the "Certification Details" page is displayed.

Optional Functions	
Reset Filters Button	When the Reset Filters button is selected, the system will reset to default values.

Optional Functions	
⊙ Default(10) ○ 20 ○ All	The system will default to show up to ten results per page. To see more, select either the twenty or ALL radio buttons.
School	Last Certifier	Last Certify Date	To sort a particular column, select the column heading link. The first click on the field name orders records in ascending order; the second click orders records in descending order.

9.2.2 Certification Details

The "Certification Details" page displays for an authorized user the details of the selected school, and a certification history of the selected school. This page is accessed when the user selects the School Name link on the "Certifications Status" page.

From this interface, the user is able to:

• View the Certification steps and current status

• View the history of a selected snapshot

• Manipulate the page display and page navigation

• Return to view the "Certification Status" page

Screen 9-2: Certification Details

Instructions Table 9-2: Certification Details

	Step by Step Screen Instructions	Special Instructions
1	The Key Elements (School, Last Certifier, Last Certify Date, and Certification Status) for the selected school will be displayed in the top portion of the screen.	These are read-only fields.
2	Select the Review Certification Errors link to view the certification errors for the School.	This step must be completed before viewing the certification reports or certifying data.
3	Select the View Certification Reports link to view the certification reports for the School.	This step must be completed before certifying data.
4	Select the Certify data link to certify the data for the School.	Certification Errors and Certification report tasks must be completed before a user can certify.
5	The Certification Summary (# of Demographic Records, # of Course Records, and # of Assessment Records) for the selected school will be displayed in the middle of the screen.	These are read-only fields.
6	Review the Snapshot History: The history displays all activity related to the particular snapshot being reviewed.	

Optional Functions	
Return to Certification Status Return to Certification Status Button	If the Return to Certification Status button is selected, the system will display the "Certifications Status" page.
◉ Default(10) ○ 20 ○ All	The system will default to show up to ten results per page. To see more, select either the twenty or ALL radio button.
Date User # of Demographic Records	To sort a particular column, select the column heading link. The first click on the field name orders records in ascending order; the second click orders records in descending order.

9.2.3 Certification Errors

The "Certification Error" page displays for an authorized user fatal errors and warnings of the selected school with summary and detailed information of the errors. This page is accessed when the user selects a Review Certification Errors link on the "Certifications Details" page.

From this interface, the user will be able to:

• View the identified Error Categories of a selected school

• View the aggregate count for each Error Category

• View the identified Validation Error(s) of each Error Category

• View the aggregate count for each Validation Error by Category

• View the school total count for each Validation Error by Category

• Launch a report on the lower portion of the screen to view the details associated with a validation error

• Manipulate the page display and page navigation

• Return to view the "Certifications Details" page

Screen 9-3: Certification Errors

Certification Errors

School	Last Certifier	1	Last Certify Date	Certification Status
High School			3/11/2015 3:18:25 PM	Partially Certified

Certification Results Summary

	Error Severity	Total Errors	
2	Fatal Error	4	
	CERT002 A 12th grade student is missing required demographic data	4	3
	Warning	4	
	CERT003 A 12th grade student does not have at least one assessment record	4	

Next Step->Review Certification Reports

Return to Certification Details

View Certification Error Report   4

Instructions Table 9-3: Certification Errors

Step by Step Screen Instructions		Special Instructions
1.	View the details for the selected snapshot from the "Certifications Details" page for reference. Values displayed are School, Last Certifier, Last Certify Date, and Certification Status.	These are read-only fields.
2.	The results by Error Category display in the Certification Results Summary box with an aggregate count for the each Certification Error Category (Fatal Errors and Warnings). To view the counts of each Certification Error within a Category, click on the collapse/expand button ⊙ next to an Error Category.	If a particular Error Category is expanded, each error message classified in the category will be listed with the count of the number of records containing the particular error.
3.	The result by Error Category also displays the error description in the Certification Results Summary box.	
4.	Review the displayed Certification Error report and details of records to determine the corrections necessary to certify the school.	

9.2.4 Certification Reports

Screen 9-4: Certification Reports

School	Last Certifier	[1]	Last Certify Date	Certification Status
rligh School			3/11/2015 3:18:25 PM	Partially Certified

Certification Reports

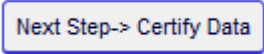| Aggregate Reports	Reviewed	Additional Supporting Reports
[2] 1.0-Transcript Summary	✓ [3]	1.1-Transcript Demographic Details
		1.2-Transcript Course Details [4]
		1.3-Transcript Assessment Details

Next Step-> Certify Data   Return to View Certification Details

Instructions Table 9-4: Certification Reports

	Step by Step Screen Instructions	Special Instructions
1	The Key Elements (School, Last Certifier, Last Certify Date, and Certification Status) for the selected school will be displayed in the top portion of the screen.	These are read-only fields.
2	The system displays the Aggregate Reports for the selected snapshot. If the Report Name link is selected, the system generates and displays a report with the defined data.	These reports must be reviewed before the school can be certified.
3	The Reviewed icon will display as completed (a green circle with a check mark in the middle) after a user has selected a link to review the report. If the report has not been viewed, the icon displayed is a red circle with an "x". ✓ ✗	All aggregate certification reports must be marked as reviewed before the school can be certified.
4	The system displays additional supporting reports for the selected snapshot. If the Report Name link is selected, the system generates and displays a report to aid the user in determining if the data is ready for certification.	Viewing the additional reports is optional, but provides supporting information for the certification Aggregate Reports.
5	Select one of the following buttons to complete the task.	See descriptions of buttons below.

Optional Functions	

Optional Functions	
Next Step -> Certify Data Button	The Next Step -> Certify Data button will only be enabled when the Reviewed column contains a completed icon for each mandatory Certification Report and Certification Step. The user will be prompted to confirm certification of the data for the selected school. Once the data is certified, the Data Transport System will transfer the data to the Parchment Transcript System.
Return to View Certification Details Button	If the Return to View Certification Details button is selected, the system will display the "Certifications Details" page.

10. Reports

Through the Reports Tab, an authorized user has several options to view and extract data from the Data Transport System:

- Error Reports: Select to view available reports displaying file submission and certification error reports.

- Certification Reports: Select to view available reports displaying data representing the certified and uncertified data.

Screen: 10-1: Reports Menu

10.1 Error Reports

The Error Reports display the most recent file submission and related error reports that were submitted for processing by the Data Transport System. Reports show data loading results, warnings and errors for each file submission. The content of each report is customizable by the report filters listed for a specific report. Reports may also be exported/downloaded in several formats.

Users may access the Error Reports by selecting the Error Reports link from the Reports menu. All Error Reports will be listed and accessible to authorized users on the Reports Home landing page. The user may view a report by selecting a specific report link. The user will then be prompted to select values for a set of available filter options. The screens below provide instructions for the user to generate reports.

Screen 10-2: Error Report Instructions (Landing Page)

Error Reports

- o 0.1 - Submission Error Report
- o 0.2 - Certification Error Report

Click to View Report

Screen: 10-3: Error Report Instructions (Filter)

1 Customize the report by selection of available filter options

2 Click to generate the report based on the selected filter values

Return to Error Reports Home

Select Record Type	<Select a Value>	Job ID	
Error Severity	All	Select District	
Error Code		Select School	
State ID		☑ NULL	

View Report

Screen: 10-4: Error Report Instructions (Detail)

10.2 Certification Reports

The Certification Reports page displays the most up-to-date data in the Data Transport System. Reports show aggregate counts of data as well as detailed data in support of the aggregate counts. The content of each report is customizable by the report filters listed for a specific report. Reports may also be exported/downloaded in several formats.

Users may access the Certification Reports by selecting the Certification Report link from the Reports menu. All Certification Reports will be listed and accessible to authorized users on the Reports Home landing page. The user may view a report by selecting a specific report link. The user will then be prompted to select values for a set of available filter options. The screens below provide instructions for the user to generate reports.

Screen 10-5: Certification Report Instructions (Landing Page)

Customize the report by selecting available filter options 1

Click to generate the report based on the selected filter values 2

10.3 Report Specifications

Data Transport System reports are listed in the following table, along with an indication of the data they report (Staging vs ODS). Additionally, the table below identifies if the report is an aggregate or supporting report.

Figure 10-1: Data Transport Reports

	Source			Category
Report	**Staging**	**Uncertified**	**Certified**	**Aggregate/ Supporting**
0.1 Submission Error Report	X			n/a
1.0 - Certification Error Report		X		n/a
1.0 - Transcript Summary		X	X	Aggregate
1.1 - Transcript Demographic Detail		X	X	Supporting
1.2 - Transcript Course Detail		X	X	Supporting
1.3 - Transcript Assessment Detail		X	X	Supporting

Report 0.1: Submission Error Report

Description:	Lists fatal errors and warnings found in demographic, course, and assessment record file types that prevent a record from being submitted – used for data review and correction of records. Filters allow review of the errors and warnings in a variety of different ways.
Data Views/Type:	Staging Data
Students Included:	Submitted students on the Job selected. User selects what type of input (Demographics, Course, Assessment)
Links:	N/A
Calculations:	Transaction Statistics on last page for fatal errors (total rejected records by Error Code) and warnings (total rejected records by Error Code).

Figure 10-2: Report 0.1 - Submission Error Report

0.1 - Submission Error Report

User Filter Selections:	
Record Type:	Demographic Record
Submitter:	OpiUser1
Job ID:	3007
District:	
School:	All
Error Severity:	All
Error Code:	All
State ID:	All

State ID	Student Name	School Name	Error Code	Error Description	Field Name	Field Value	Error Severity
			TRDEM008	Missing Demographic Data	GraduationYear	2015	Warning

Transaction Statistics:

		Total Rejected Records	Total Errors
	Error Code:		1
Warning	TRDEM008	1	

Report 0.2: Certification Error Report

Description: Displays Certification Errors (CERTnnn) for a selected school

Data Type: All possible data types that are associated with certification errors are displayed. The Data Transport System report displays only the certification rules that are associated with the user's selected data type(s) and only those records that are associated with the certification errors are included.

Links: None

Calculations: Transaction Statistics on last page for fatal errors (total rejected records by Error Code) and warnings (total rejected records by Error Code).

Figure 10-3: Report 0.2 – Certification Error Report

0.2 - Certification Error Report

User Filter Selections:	
Certification Date:	03/11/2015 15:19:25
District:	.
School:	. . ..
Error Category:	All
Error Severity:	All
Error Code:	All
State ID:	458774506

State ID	Student Name	School Name	Error Category	Error Code	Error Description	Field Name	Field Value	Error Severity
. .	. , .	, .	Invalid Data	CERT003	A 12th grade student is missing required demographic data.			Warning

Transaction Statistics:

		Total Rejected Records	Total Errors
	Error Code:		1
Warning	CERT003	1	

Report 1.0: Transcript Summary

Description:	Displays the transcript record counts by category (Demographic, Course, and Assessment) for specific student at the school level for a selected school
Data Type:	ODS (Certified and Uncertified)
Links:	From Column: # Demographic Records to 1.1 Transcript Demographic Detail
	From Column: # Course Records to 1.2 Transcript Course Detail
	From Column: # Assessment Records to 1.3 Transcript Assessment Detail
Calculations:	None

Figure 10-4: Report 1.0 – Transcript Summary

1.0 - Transcript Summary Report

User Filter Selections:	
View:	Certified
District:	
School:	. High School
Graduation Year:	All
State ID:	.

School Code	School Name	State ID	Student Name	Local ID	Gender	Birthdate	# Demographic Records	# Course Records	# Assessment Records
	. High School						1	38	14
							1	38	14

Report 1.1: Transcript Demographic Detail

Description:	Displays the detail demographic records included in the student aggregate counts on 1.0- Transaction summary report
Data Type:	ODS (Certified and Uncertified)
Links:	None
Calculations:	None

Figure 10-5: Report 1.1 – Transcript Demographic Detail

1.1 - Transcript Demographics Detail Report

User Filter Selections:	
View:	Uncertified
District:	
School:	
Graduation Year:	All
State ID:	

Student Information

State ID	Local Student ID	Student First Name	Student Last Name	Student Middle Name	Suffix	Parent First Name	Parent Last Name	Student Birthdate	Student Gender	Student Home Address1	Student Home Address2	Student City	Student State	Student Code

School

School Code	School Name	School System Name	School Address Line One	School Address Line Two	School City	School State	School Code

Graduation Information

Graduation Date	Enrollment Start date	Exit Date	GPA Type	GPA	Class Rank	Class Size	Diploma Type	Academic Honors 1	Academic Honors 2	Academic Honors 3	Academic Honors 4	Academic Honors 5	Required Number of Credits for Graduation	Graduation Year	Co-Curricular 1	Co-Curricular 2	Co-Curricular 3	Co-Curric 4

Immunization Information

Polio Immunization Date	DPT/DtaP/DT/td Immunization Date	MMR Immunization Date	HIB Meningitis Immunization Date	Meningococcal Immunization Date	Hep A Immunization Date	HBV Immunization Date	Varicella (Chicken Pox) Immunization Date	TB Immunization Date	RSV Immunization Date	PCV Immunization Date	PPV Immunization Date	INF Immunization Date	HPV Immunization Date	Other Immuniza Type

Report 1.2: Transcript Course Detail

Description:	Displays the detail course records included in the student aggregate counts on 1.0- Transaction summary report
Data Type:	ODS (Certified and Uncertified)
Links:	None
Calculations:	None

Figure 10-6: Report 1.2 – Transcript Course Detail

1.2 - Transcript Course Detail Report

User Filter Selections:	
School Year:	All
View:	Uncertified
District:	
School:	
Graduation Year:	All
State Course Code:	All
Term:	All
Session Number:	All
State ID:	

State ID	Student Name	School Name	School Year	Term	Session Number	Grade	State Course Code	Local Course Code	State Course Name	Local Course Name	Credits Earned

Report 1.3: Transcript Assessment Detail

Description: Displays the detail assessment records included in the student aggregate counts on 1.0- Transaction summary report

Data Type: ODS (Certified and Uncertified)

Links: None

Calculations: None

Figure 10-7: Report 1.3 – Transcript Assessment Detail

1.3 - Transcript Assessment Detail Report

User Filter Selections:	
View:	Uncertified
District:	
School:	... '
Graduation Year:	All
Test	All
State ID:	'

State ID	Student Name	Test	Subtest	Other Test Description	Test Date	Test Score Method	Test Score

11. Help

The Help Page provide users access to online learning tools and reference documents for the Data Transport System. When a user selects the Help tab the following sub-menus are displayed:

- Error List
- User Guide
- Batch File Templates Download

Screen 11-1: Help Menu
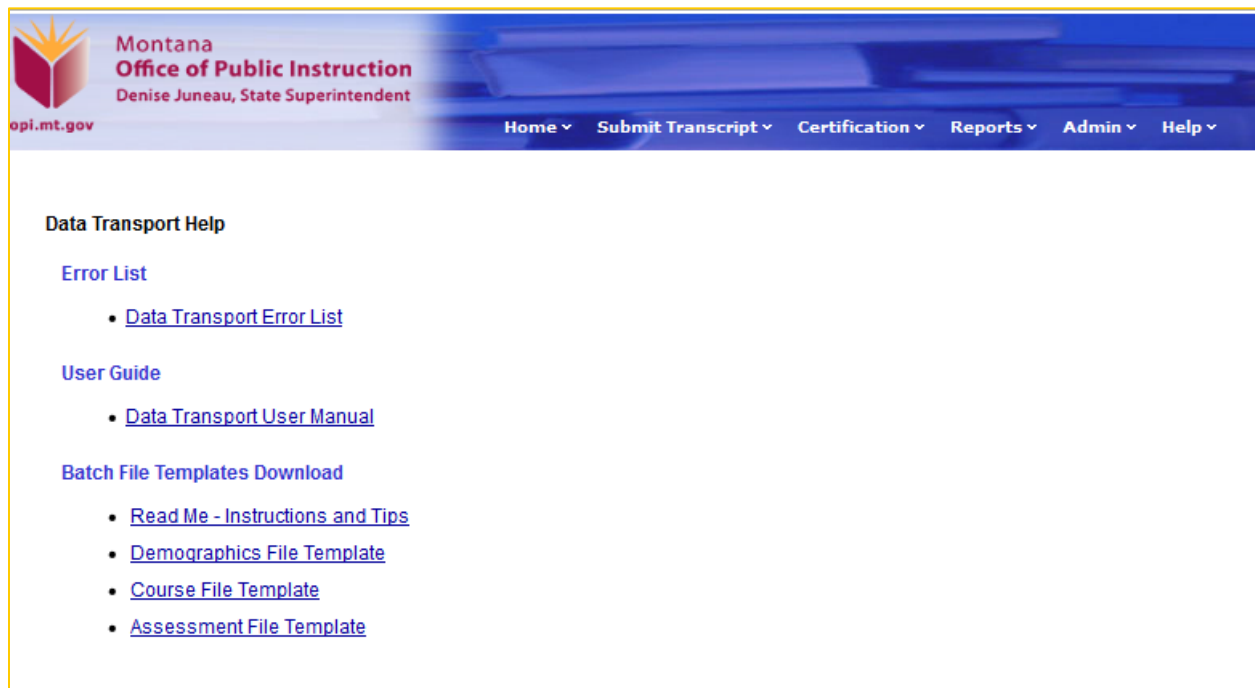
11.1 Error List

If a user clicks the Data Transport Error List link, the Error List Spreadsheet is displayed. The error list will capture the following attributes about all input validation and certification errors:

- Error #

- Error Name

- Error Description

- Severity

- Record Type/Fields Validated

- Suggested Resolution

Below is an example of a sample entry from an Error List document.

Figure 11-1: Sample Error List Entry

Error #	Error Name	Error Description	Severity	Fields Validated	Suggested Resolution
TR-CRS005	Demographic Record Missing in ODS or Invalid State ID	Demographic Record Missing in ODS or Invalid State ID	Fatal	2.01 State ID	Understanding the Error: The submission contains a State ID that does not have demographic data in the Data Transport System. Things to check for in submission: 1. Verify that the State ID provided in the submitted file is correct 2. Verify if the demographic data has been submitted to the Data Transport System Suggested Resolution: 1. If one or more of the vields validated is incorrect, correct the data. OR 2. Submit a demographic record for the student

11.2 User Guide

If a user clicks the Data Transport User Manual link, the most recent User Manual is displayed. The user manual will capture the following attributes about all screens and functions within the system:

- Navigation
- Screen/Function Overview
- Screen Shot
- Instructions Table

11.3 Batch Templates

If a user clicks on a template link under the Batch File Templates Download, an excel spreadsheet will display that matches the selected file type. For example, if a course file template is selected, the spreadsheet is designed for a user to complete course data entry for one or more students and submit it for batch processing. Additionally, a Read Me – Instructions and Tips file will be available for guidance on populating the template.

Below is an example of a Batch File Template.

Figure 11-2: Sample Batch File Template

Record Type Code	UserID	Date										
TR-CRS												
Record Type Code	Student ID	Grade	School Year	School Name	Course Code	Local Course Code	Course Name	Local Course Name	Credits Earned	Course Grade	Term	Session Number
TR-CRS												

12. Contact and Support

12.1 K20 Website

- Located on the OPI website
- Under "Reports & Data" tab
- http://opi.mt.gov/Reports&Data/K20.html
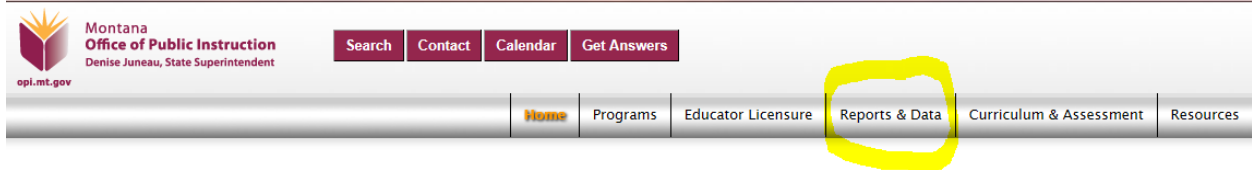
12.2 OPI Help Desk

Toll Free Number: 877-424-6681

Local Helena Area Number: 406-444-3800